

# AI Pilot Offer

Scope a small engagement for a real user. Separate measured evidence from assumptions and secure approval before implementation.

Project or record

Owner

Date

## Client or user and need

Name the audience, problem, decision, and the value they want from the pilot.

## Deliverables and exclusions

Specify tangible outputs, limits, data access assumptions, and excluded work.

## Timeline and checkpoints

List milestones, owner responsibilities, review points, and handoff arrangements.

## Price assumptions and tool costs

Record proposed fee, setup effort, recurring tools/usage, and who pays each cost.

## Success measure and acceptance

Define how results will be tested and the evidence required to accept the pilot.

## Controls and agreement

Record data permission, human approvals, support limits, named approver, and agreement date.