AI Pilot Card

Complete before the start, not after the results | Version 1.0

Supporting template. The sample values in the "Example" column are illustrative and do not come from research. Replace them with your own data.

Field	Enter	Example (hypothetical)
1. Pilot name and owner		AI-assisted draft offers; owner: sales manager
2. Task (one)		Preparing a draft offer for typical requests for quotation
3. Hypothesis		AI will shorten the preparation of a draft without an increase in corrections
4. Users (5–15) and period (6–8 weeks)		5 salespeople, 6 weeks
5. Tool and account		A tool from the approved list, company account
6. Data class		Yellow, no personal data
7. Human review		The salesperson checks every draft before it is sent
8. Baseline measurement (before the start)	Time: ____ Corrections: ____ Complaints: ____ Measurement period: ____	On average 2 h per offer; 10% of offers with a client correction
9. Pilot metrics		Time per offer; share of offers with a correction; user satisfaction (1–5)
10. Budget (licences + people's time)		[amount] PLN, hard limit
11. "Go on" criterion		Time down by at least 25% and the share of corrections not rising
12. "Stop" criterion		No 10% drop in time after 4 weeks, or an increase in corrections
13. Known risks and measures		Pricing errors: we check the price list twice
14. Reviews		Every week, 15 minutes: cases where the tool made a mistake
15. Decision date and participants		[date]; board, AI topic owner

Post-pilot summary

Result vs baseline measurement	
What went wrong (cases)	
Actual cost (licences + time)	
Decision	☐ Scale ☐ Improve and repeat ☐ Stop

Justification	
Changes to the AI policy	

Rule: we write down the success and stop criteria before the start. A result below the threshold means the end of the pilot, not an extension.