

# The Pilot Exit Criteria

Fill this in **before the pilot starts**, with the vendor in the room. The goal isn't a perfect forecast. It's agreeing on where you're starting from, who owns which part of the result, and what you'll have learned even if the numbers don't move.

## PART ONE

### The baseline comes first

One row per measure. No targets yet: you can't agree on an improvement until you know the starting point.

| WHAT WE'RE MEASURING | HOW WE'LL MEASURE IT | BASELINE | DATE CAPTURED |
|----------------------|----------------------|----------|---------------|
|                      |                      |          |               |
|                      |                      |          |               |

## PART TWO

### Who controls which part of the result

Nobody can be held to a goal they don't control. Write down the tasks each party owns, so the goals can be shared honestly.

|                                                                                 |                                                                          |                                                                                                        |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <b>The vendor</b><br>What the tool and their team will do.<br><hr/> <hr/> <hr/> | <b>Us</b><br>The tasks your team controls directly.<br><hr/> <hr/> <hr/> | <b>The people we depend on</b><br>Outside your team. For us, it's our physicians.<br><hr/> <hr/> <hr/> |
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### What we'll know even if it falls short

The floor. If the numbers never move, what will you understand at the end that you don't today? If the answer is "nothing," the pilot is too risky as designed.

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# Decide Now What the Results Mean

Write the calls down while nobody has a result to defend. A disappointing number then comes with a plan instead of a debate, and a good one comes with the case for the bigger ask **already made**.

## Scale it if

The results that would justify the bigger contract, and who you'd take them to.

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## Fix and rerun if

Results that fall short for a reason you can fix, such as a part of the work that never got done.

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## Stop if

Everyone did their part and it still didn't move. Agree now that this is a real answer.

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## CHECKPOINTS

### Check your own side first

Not just at the end. At each checkpoint, ask about yourselves before you ask about the tool.

| DATE | DID WE DO<br>OUR TASKS? | DID THEY TAKE PART,<br>OR WAIT ON US? | IS THE VENDOR<br>DOING THEIRS? | WHAT WE<br>CHANGE NEXT |
|------|-------------------------|---------------------------------------|--------------------------------|------------------------|
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## If we're doing our part and they aren't

Don't cancel yet. Write the one-sentence "why" that shows them their participation decides the result, and who will deliver it.

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## A yes from governance tells you it's safe. It doesn't tell you it's worth it.

THE AI PILOT IS THE BUSINESS CASE