SDI ScienceDocs Inc.
Research • Funding • AI Strategy • Est. 2004

Pilot Design Brief

A practical planning template for designing focused pilots that generate usable commercialization, adoption, technical, operational, regulatory, funding, or partner evidence.

Purpose

Use this brief before launching a pilot with a customer, clinical site, industry partner, university lab, internal operating unit, or early adopter. The goal is to define what will be tested, why it matters, who is involved, what evidence will be collected, and what decision the pilot is expected to support.

1. Pilot Snapshot

Pilot Name		**Prepared By**	
Organization / Team		**Date**	
Technology / Product / Service		**Pilot Sponsor**	
Target User / Customer		**Pilot Site / Partner**	
Pilot Type	☐ Technical validation ☐ Customer pilot ☐ Operational pilot ☐ Clinical / field pilot ☐ AI / digital pilot	**Commercialization Stage**	☐ Discovery ☐ Validation ☐ Funding ☐ Pilot ☐ Launch ☐ Scale
Planned Start		**Planned End**	
Primary Pilot Owner		**Decision Owner**	
Decision After Pilot	☐ Continue development ☐ Seek funding ☐ Launch ☐ Partner/license ☐ Pivot ☐ Stop	**Decision Date**	

2. Problem, Use Case, and Pilot Rationale

Problem or need being tested	Describe the real-world problem, unmet need, workflow challenge, technical gap, or adoption barrier the pilot will address.
Why this problem matters now	Summarize urgency, cost, risk, inefficiency, market pressure, clinical need, regulatory driver, customer demand, or strategic opportunity.
Pilot use case	Define the specific use case. Keep the pilot narrow enough to evaluate clearly.
Current alternative or workaround	What are users doing today? What products, manual processes, services, or workarounds will the pilot be compared against?
Stakeholder value hypothesis	Who benefits, and what measurable improvement is expected?
Why a pilot is needed	What uncertainty cannot be resolved through desk research, interviews, prototyping, simulations, or internal analysis alone?

3. Pilot Goals and Learning Questions

Goal / Learning Question	Why It Matters	Evidence Needed	Decision It Supports

4. Target Participants, Stakeholders, and Roles

Stakeholder / Group	Role in Pilot	Decision Influence	What They Need	Owner

5. Pilot Scope and Boundaries

Included?	Pilot Design Element	Notes / Evidence
☐	Pilot population, site, department, partner, or customer segment is clearly defined.	
☐	In-scope functions, workflows, users, features, or technical components are listed.	
☐	Out-of-scope requests and future enhancements are identified to prevent scope creep.	
☐	Pilot duration is long enough to generate evidence but short enough to manage cost and momentum.	
☐	Dependencies, required systems, data sources, approvals, and participant availability are understood.	
☐	Minimum viable pilot version is defined separately from future product or full implementation scope.	

6. Pilot Workflow and Experience Design

Pilot Step / Touchpoint	What Happens	Responsible Party	Evidence / Output
Recruit / onboard participants			
Baseline assessment			
Configure / deploy solution			
Training / orientation			
Pilot use period			
Support / issue tracking			
Data collection			
Closeout / debrief			

7. Requirements, Data, and Technical Readiness

Requirement / Resource	Needed for Pilot?	Owner	Status	Gap / Action
Prototype / product version	☐ Yes ☐ No ☐ TBD			
Data access or sample data	☐ Yes ☐ No ☐ TBD			
Integration or API need	☐ Yes ☐ No ☐ TBD			
Hardware / equipment	☐ Yes ☐ No ☐ TBD			
Security or privacy review	☐ Yes ☐ No ☐ TBD			
Training materials	☐ Yes ☐ No ☐ TBD			
Support process	☐ Yes ☐ No ☐ TBD			

8. Evidence Plan and Success Metrics

Define the evidence that will make the pilot useful beyond the immediate test. Include both quantitative metrics and qualitative learning.

Metric / Evidence	Baseline	Target	Data Source	Collection Timing	Owner
User adoption / usage					
Technical performance					
Workflow impact					
Time / cost / productivity					
Quality / outcome measure					
Stakeholder satisfaction					

9. Risk, Compliance, and Adoption Considerations

Risk / Concern	Potential Impact	Likelihood	Mitigation / Control	Owner
Participant burden or low engagement				
Data quality or access problem				
Technical failure or				

Risk / Concern	Potential Impact	Likelihood	Mitigation / Control	Owner
integration gap				
Privacy / security / confidentiality issue				
Regulatory, clinical, or IRB consideration				
Workflow disruption or adoption resistance				
Sponsor or stakeholder misalignment				

10. Timeline, Milestones, and Resources

Phase	Start	End	Key Activities	Deliverable	Owner
Design / scoping					
Approvals / agreements					
Configuration					
Recruitment / onboarding					
Pilot execution					
Analysis / closeout					

11. Budget and Support Planning

Resource / Cost Category	Estimated Cost	Internal / External	Funding Source	Notes
Personnel / project management				
Technical development or configuration				
Data, software, or infrastructure				
Participant/site support				
Regulatory, legal, or contracting				
Analysis, reporting, and closeout				

12. Decision Framework and Next-Step Plan

Decision Path	Condition / Evidence Needed	Next Action	Owner
Proceed to launch or implementation			
Proceed to larger pilot			
Seek funding or investment			
Revise product / workflow / claims			
Pause or stop			

13. Pilot Design Readiness Checklist

Done?	Readiness Item	Notes
☐	Pilot objective, target users, site context, and decision purpose are clear.	
☐	Problem, current workaround, and stakeholder value hypothesis are documented.	
☐	Scope, boundaries, timeline, roles, and owner responsibilities are defined.	
☐	Data, technical, integration, security, regulatory, and training needs are understood.	
☐	Success metrics, baseline data, targets, and evidence sources are identified.	
☐	Risks and adoption barriers have mitigation plans.	
☐	Budget, staffing, partner expectations, and closeout process are realistic.	
☐	The team knows what decision will be made	

Done?	Readiness Item	Notes
	after the pilot.	

14. Notes and Open Questions

Topic	Notes / Questions / Follow-Up

ScienceDocs Support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization for scientific, technical, university spinout, startup, and growth-stage organizations.