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

Pilot Readiness Checklist

A practical readiness worksheet for determining whether a technology, product, service, process improvement, AI solution, or commercialization concept is prepared for a structured pilot with customers, partners, users, or internal stakeholders.

Purpose

Use this checklist before launching a pilot to confirm that the objective, customer or site context, technical approach, evidence plan, workflow, training, data needs, risks, budget, and decision criteria are sufficiently defined. The goal is to avoid pilots that are interesting but poorly scoped, under-supported, hard to evaluate, or disconnected from commercialization decisions.

1. Pilot Snapshot

Pilot / Project Name		**Prepared By**	
Organization / Team		**Date**	
Technology / Solution		**Target User / Customer**	
Pilot Site / Partner		**Pilot Sponsor / Owner**	
Planned Start Date		**Planned End Date**	
Pilot Type	☐ Internal test ☐ Customer pilot ☐ Clinical / field pilot ☐ Technical validation ☐ Operational rollout	**Commercialization Stage**	☐ Discovery ☐ Validation ☐ Funding ☐ Pilot ☐ Launch ☐ Scale
Primary Decision After Pilot	☐ Continue development ☐ Seek funding ☐ Enter partnership ☐ Launch ☐ Pivot ☐ Stop	**Decision Date**	

2. Pilot Objective and Success Definition

Pilot objective	What specific question should this pilot answer?
Primary hypothesis	What do you believe will be true after the pilot?
Success criteria	What results would justify moving forward? Include numeric targets where possible.
Failure or stop criteria	What results would indicate that the project should be paused, redesigned, or stopped?
Commercial decision supported	How will the pilot influence product definition, customer targeting, pricing, funding, licensing, regulatory strategy, adoption, or launch?
Evidence to produce	What evidence should be generated for customers, investors, grant reviewers, internal leadership, or partners?

3. Readiness Scoring Summary

Score each category from 0 to 3: 0 = not addressed, 1 = early / unclear, 2 = mostly ready with gaps, 3 = ready for pilot launch.

Readiness Area	0	1-2	3	Evidence / Notes
Pilot objective and success criteria	☐	☐	☐	
Target user/customer and site fit	☐	☐	☐	
Technical/product readiness	☐	☐	☐	
Data, metrics, and evidence plan	☐	☐	☐	
Workflow and operational readiness	☐	☐	☐	
Stakeholder/sponsor support	☐	☐	☐	
Training and adoption readiness	☐	☐	☐	
Legal, privacy, regulatory, and IP considerations	☐	☐	☐	
Budget, timeline, and resourcing	☐	☐	☐	
Risk management and decision gates	☐	☐	☐	

4. Customer, Site, and Stakeholder Readiness

Ready?	Pilot Readiness Item	Score	Notes / Evidence
☐	The pilot site, customer, department, partner, or internal team has been clearly identified.	0 1 2 3	
☐	A pilot sponsor or accountable decision-maker has agreed to support the pilot.	0 1 2 3	
☐	Primary users and buyers are known, and their roles in the pilot are defined.	0 1 2 3	
☐	Stakeholder incentives, concerns, and adoption risks have been discussed.	0 1 2 3	
☐	The pilot site has enough volume, workflow relevance, or use-case fit to generate meaningful evidence.	0 1 2 3	
☐	Access to users, data, systems, or facilities has been confirmed or is realistically obtainable.	0 1 2 3	
☐	The team has documented what each stakeholder expects to learn from the pilot.	0 1 2 3	
☐	There is a communication plan for kickoff, updates, escalation, and final review.	0 1 2 3	

5. Technical, Product, and Data Readiness

Ready?	Pilot Readiness Item	Score	Notes / Evidence
☐	The product, prototype, process, model, method, or technology is stable enough for pilot use.	0 1 2 3	
☐	Known technical limitations are documented and will not invalidate the pilot objective.	0 1 2 3	
☐	Integration needs, system access, data inputs, and technical dependencies are understood.	0 1 2 3	
☐	Baseline data are available or can be collected before pilot implementation.	0 1 2 3	
☐	Pilot metrics are defined, measurable, and tied to the decision the pilot is meant to support.	0 1 2 3	
☐	Data collection responsibilities, cadence, format, and storage location are defined.	0 1 2 3	
☐	Security, privacy, confidentiality, and data-use assumptions have been reviewed.	0 1 2 3	
☐	A troubleshooting and escalation path exists for technical issues during the pilot.	0 1 2 3	

6. Workflow, Training, and Adoption Readiness

Ready?	Pilot Readiness Item	Score	Notes / Evidence
☐	The current workflow or user journey has been mapped at a practical level.	0 1 2 3	
☐	The future-state pilot workflow is understandable to users and site leadership.	0 1 2 3	
☐	Training materials, quick-start instructions, or user support resources are planned.	0 1 2 3	
☐	Expected user behaviors are defined so adoption can be evaluated.	0 1 2 3	

Ready?	Pilot Readiness Item	Score	Notes / Evidence
☐	The pilot does not create unmanageable burden for users, coordinators, administrators, or customers.	0 1 2 3	
☐	Feedback channels are established for users, managers, customers, or site champions.	0 1 2 3	
☐	Change impacts are documented, including role changes, process changes, or new responsibilities.	0 1 2 3	
☐	A plan exists for handling resistance, confusion, low usage, or early implementation problems.	0 1 2 3	

7. Legal, Regulatory, IP, and Commercial Fit

Ready?	Pilot Readiness Item	Score	Notes / Evidence
☐	Any required agreements, approvals, NDAs, data-use terms, or site permissions are identified.	0 1 2 3	
☐	Regulatory, clinical, quality, IRB, safety, export control, or compliance questions have been screened if applicable.	0 1 2 3	
☐	IP ownership, licensing, background IP, and publication/disclosure concerns have been considered.	0 1 2 3	
☐	Commercialization goals are clear enough to shape what evidence the pilot should generate.	0 1 2 3	
☐	The pilot can produce evidence useful for customers, funders, investors, partners, or internal leadership.	0 1 2 3	
☐	Budget assumptions and potential follow-on funding paths have been considered.	0 1 2 3	
☐	The pilot is not prematurely positioned as a full launch, full validation study, or definitive market proof.	0 1 2 3	
☐	A post-pilot decision pathway is defined, including who will decide and what evidence they will review.	0 1 2 3	

8. Pilot Risk Register

Risk / Concern	Category	Likelihood	Impact	Mitigation / Contingency	Owner

9. Pilot Timeline and Milestones

Phase	Start	End	Key Activities	Deliverables / Evidence	Owner
Planning					
Setup / Agreements					

Phase	Start	End	Key Activities	Deliverables / Evidence	Owner
Training / Kickoff					
Active Pilot					
Data Review					
Final Decision					

10. Decision Gate and Next-Step Action Plan

Action / Decision Needed	Required Evidence or Input	Owner	Due Date

ScienceDocs Support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization. We help teams design pilots that are practical, evidence-driven, fundable, and connected to real commercialization decisions.