Pilot planning asset

One process, one month, a pilot with a defined boundary.

A practical 30-day plan for selecting, designing, and launching the first AI transformation pilot.

> Each week has a named output and a clear gate — so the 30 days ends with a decision-ready pilot plan, not an open-ended evaluation.

ASSET PROMISE

Shows buyers how Axeron turns one process into a governed pilot instead of a vague transformation program.

BEST AUDIENCE

Executives, innovation teams, transformation leaders, public-sector program owners

RECOMMENDED USE

Use before or after an enterprise briefing to help the buyer align internal stakeholders and define a practical next step.

METHODOLOGY

The 30-day sequence has four weeks, each with a defined output and a gate that must be met before the next week b egins. The gate structure is what separates a governed pilot from a meandering proof-of-concept. If a gate cannot be met, t he sequence surfaces the gap early — before build costs accumulate.

01

Week 1 — choose the workflow

Leadership confirms a sponsor with budget authority. Axeron and the sponsor jointly select one candidate workflow against four criteria: a named process owner, visible operational pain, an observable baseline, and a risk boundary that keeps the pilot containable. By the end of week one, the team has one workflow on paper, a draft success metric, and a list of source systems and data owners. Gate: sponsor sign-off on the selected workflow and the success metric.

02

Week 2 — map current state

Process Discovery interviews the frontline users who do the work and reviews the actual documents, forms, approval chains, and system handoffs the process runs on. The output is a current-state map showing how the process actually runs — including exception paths, rework cycles, and the informal rules that no policy document captures. Gate: process owner reviews and accepts the current-state map as an accurate picture.

03 **Week 3 — design future state**

AxeStudio designs the AI-enabled version of the workflow: where an agent handles volume and preparation work, where a human retains the decision, and where a governance gate is required by policy or risk. The team selects the Axeron product stack, confirms the deployment model (SaaS, private cloud, or on-prem), and defines the human approval points the governance layer will enforce. Gate: sponsor and process owner approve the future-state design and deployment model.

04 **Week 4 — prepare pilot build**

The team translates the future-state design into an implementation backlog: data requirements, integration dependencies, governance settings, audit fields, and the KPIs that will measure the pilot against the baseline established in week one. The output is a build-ready document the AxeStudio implementation team can act on immediately. Gate: leadership reviews the backlog and makes a binary build decision — proceed or revise scope.

01 Why start with 30 days

The first month should not attempt to transform the whole organization. It should identify one valuable workflow, define the baseline, design the future state, confirm the deployment boundary, and prepare a pilot that can prove value.

02 Week 1: choose the workflow

Axeron works with leadership to choose a process with clear ownership, visible pain, measurable baseline, and manageable risk.

- Confirm sponsor
- Select workflow
- Gather documents
- Define success metric
- Identify systems and data owners

03 Week 2: map current state

Process Discovery maps how work actually happens, including handoffs, approvals, documents, exceptions, and rework loops.

04 Week 3: design future state

AxeStudio designs the AI-enabled workflow, defines human approval points, selects the Axeron product stack, and confirms the deployment model.

05 Week 4: prepare pilot build

The team defines implementation tasks, data requirements, governance settings, KPIs, and the first pilot operating model.

06 What the buyer gets after 30 days

The organization should have a scoped pilot plan, value hypothesis, process map, governance design, implementation backlog, and decision path for moving into build.

WORKFLOW-READINESS SCORECARD

Run this scorecard before the 30-day plan begins. Each dimension answers one question: is this organization ready to move at pace? Score each as Ready, Workable, or Not yet. A single Not yet on Sponsor commitment or Governance intent is a blocker — resolve it before starting the clock, or the four-week sequence will stall at its gate.

01 **Sponsor commitment**

Is there one named executive who has budget authority, the time to attend weekly gate reviews, and the organizational standing to approve the future-state design? Ready: named sponsor with confirmed availability and budget. Workable: named sponsor, shared sign-off with one peer, available weekly. Not yet: sponsor is a committee, or the budget owner is not in the room.

02 **Workflow selection readiness**

Has the team identified at least one candidate workflow with a named process owner, observable pain, and a risk boundary the organization is willing to contain for 90 days? Ready: two or three candidates shortlisted; ownership is unambiguous. Workable: one candidate identified; ownership needs one conversation to confirm. Not yet: the organization has not yet agreed which process to examine, or every candidate has contested ownership.

03 **Baseline availability**

Can the current performance of the selected workflow be observed — even approximately — within the first week? Ready: volume, cycle time, and a quality or error indicator are already tracked in a system or a maintained log. Workable: estimates can be produced from interviews and email archives within two to three days. Not yet: no one knows how much work flows through or how long it takes, and no log or system captures it.

04 **Data and document access**

Can the team access the source documents, forms, and system data the workflow depends on during the discovery week, without a lengthy security or procurement process? Ready: source documents are in a known location and a project team member has access. Workable: access requires one internal approval that can be obtained in one to two days. Not yet: access requires a formal procurement or legal review that will take longer than one week.

05 **Governance intent**

Has the organization decided, in principle, where humans must retain the decision in the selected workflow — and is there someone accountable for defining and owning those approval points? Ready: the human decision boundary is already named in policy or by the process owner. Workable: the boundary is not yet formalized but the process owner can articulate it and has authority to define it. Not yet: no one in the organization has thought through where the agent stops and a human begins.

WHY AI PILOTS FAIL

Most 30-day pilots fail for a small set of reasons — and every one of them is visible in week one if you know what to look for. The patterns below are the most common failure modes Axeron has observed in first pilots. Each can be avoided with a gate check before the sequence begins.

WHY AI PILOTS FAIL

× Do not start the 30 days without a confirmed sponsor who can attend weekly gate reviews. A sponsor who delegates all attendance to a project manager cannot approve the future-state design or make the build decision. When that approval is needed at the end of week three, the process stalls, the timeline slips, and momentum is lost.

- × Do not select the most visible or politically significant process as the first pilot. The first pilot should be chosen for tractability — a bounded, repetitive, document-heavy workflow with an uncontested owner and a containable risk boundary. A high-visibility process carries expectations the first pilot is not equipped to meet.
- × Do not define the success metric after the build begins. The success metric must be grounded in the observed baseline from week one. A metric invented after the pilot starts will not be credible to finance or a governance committee, and cannot be compared against a pre-pilot reference point.
- × Do not treat the governance design in week three as a box-ticking exercise. The human approval points defined in week three become the operating rules of the production system. If they are defined loosely or deferred, the pilot will either operate without meaningful controls or require a re-architecture before it can reach production.
- × Do not allow scope to expand during the 30 days. Every week surfaces new ideas and adjacent workflows. Adding scope mid-plan b reaks the gate structure, extends the timeline, and diffuses the learning the first pilot is designed to produce. Capture adjacent i deas in a backlog; do not fold them into the current sequence.

WHAT TO DO INSTEAD

- → Confirm the sponsor's name, availability, and budget authority before the first week begins. The sponsor is the single point of accountability for the 30-day plan — not a steering committee.
- → Choose the first workflow for tractability, not ambition. A bounded, repetitive process with a clear owner and structured documents will produce a credible pilot faster than a complex, high-profile process with contested ownership.
- → Establish the baseline in week one, even if it requires estimation from interviews. The baseline is the reference point that makes the pilot outcome credible. An estimated baseline is better than no baseline.
- → Keep the governance design specific: name the human approval points, name who owns them, and confirm the deployment model before the week three gate closes. Vague governance does not become specific after launch.
- → Make the week four build decision binary. The output of day 30 is a decision: proceed to build, or revise the scope and restart t he gate at the point where it failed. Open-ended evaluations that never reach a decision consume organizational goodwill without p roducing a result.

WHAT YOU WALK AWAY WITH

At the close of day 30, the buyer holds a set of working documents designed for one purpose: to move the build decision f orward. Each output has a named internal audience — the executive sponsor making the build call, the implementation t eam beginning the work, and the governance or security team confirming the deployment boundary.

01 Current-state process map showing the workflow as it actually runs — steps, handoffs, approval loops, exception paths, and rework cycles — reviewed and accepted by the process owner in the week two gate.

02 Future-state agentic workflow design specifying where an agent handles volume and preparation work, where a human retains the decision, and where a governance gate is required by policy or risk — approved by the sponsor and process owner in the week three gate.

03 Pilot success definition grounded in the baseline observed in week one: a named metric, a reference value, a target direction, and the time horizon over which the pilot will be measured.

04 Deployment model confirmation stating whether the pilot will run on Axeron SaaS, a private cloud environment, or an on-premises deployment — and what data residency or security constraints shaped that decision.

05 Implementation backlog listing the data requirements, integration dependencies, governance settings, and audit field specifications the AxeStudio build team needs to begin the first agent workflow.

06 Build decision record: a one-page summary of the workflow selected, the success metric, the governance design, and the sponsor's binary decision — proceed to build or revise scope — with the rationale documented.

BEFORE YOU START

- [ ] Sponsor confirmed
- [ ] Baseline metrics collected
- [ ] Governance boundary agreed
- [ ] Build decision made
- [ ] Workflow selected
- [ ] Data sources identified
- [ ] Pilot backlog prepared

NEXT STEP

Use the first 30 days to prove where Axeron should start.

Axeron turns resource-level education into a scoped conversation: one process, one measurable outcome, one deployment model, and one governance path.