



# AIoT Pilot Planning Template

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## How to use (60 seconds)

This is a compressed, step-by-step roadmap you can fill in and circulate.

Duplicate this file. Fill in the tables per step. Keep each step to one page. Use checkboxes (■/□) to track status.

### Step 1 - Define Measurable Goals

**Objective:** Set outcome-driven, measurable targets tied to business KPIs.

#### Checklist:

- ☐ Use-case selected
- ☐ Baseline known
- ☐ SMART target set
- ☐ KPI owner named
- ☐ Review date set

#### SMART Targets (fill in):

Use case	KPI	Baseline	Target	Deadline	Owner

#### Deliverables:

- 1) One slide with baseline - target.
- 2) Written KPI definitions (how measured, frequency).

## Step 2 - Pick Your AI Model Type

**Objective:** Choose the simplest approach that meets the goal (Rules → ML → DL → GenAI).

### Checklist:

- ☐ Task-to-model match
- ☐ Data availability confirmed
- ☐ Latency/site constraints noted
- ☐ Edge/Cloud decision made

Model Selection Matrix:

Use case	Data type	Latency SLA	Runs (Edge/Cloud)	Candidate (Rules/ML/DL/GenAI)	Why this	Owner

### Deliverables:

- 1) Chosen approach per use case.
- 2) Notes on model size/feasibility at target location.

### Step 3 - Ensure Data Quality & Governance

**Objective:** Build reliable pipelines, define quality thresholds, and set governance from day one.

**Checklist:**

- ☐ Sources mapped
- ☐ Pipeline sketched
- ☐ Quality thresholds set
- ☐ Access & retention defined
- ☐ Security reviewed

**Data Plan & Quality Metrics:**

Source	Fields/frequency	Validity $\geq$	Missing $\leq$	Drift alert	Owner	Retention

**Deliverables:**

- 1) Data flow diagram.
- 2) Quality SLOs with alerts.
- 3) Access/retention policy.

## Step 4 - Build a Pilot Project

**Objective:** Prove value on a limited scope with clear success criteria and a cross-functional team.

### Checklist:

- ☐ Scope fixed
- ☐ Success criteria set
- ☐ Team staffed
- ☐ Runbook ready
- ☐ Stakeholders aligned

### Pilot Brief (one-pager):

Scope (where/what)	
Duration	
Baseline metric(s)	
Target metric(s)	
Data sources & pipeline	
Model approach & hosting	
Success criteria (numeric)	
Risks & mitigations	

**Operations Runbook (fill in):**

Alert → Action mapping	Owner on-call	Fallback / safe state	A/B flag & rollback

**Deliverables:**

- 1) Signed pilot brief.
- 2) Runbook.
- 3) Weekly report template.

## Step 5 - Scale & Integrate

**Objective:** Roll out in phases, integrate with workflows, and establish continuous improvement.

**Checklist:**

- ☐ Phase plan
- ☐ Infra capacity verified
- ☐ OTA/CI/CD in place
- ☐ Monitoring & drift alerts
- ☐ Training & SOPs updated

**Phased Rollout Plan:**

Phase	Scope	Prereqs	Go/No-Go criteria	Date	Owner



**Workflow Integration Map (systems to integrate & actions):**

System (e.g., CMMS/ERP/B MS)	Event / Insight	Triggered action	API/Interface	Owner

**Deliverables:**

- 1) Phase rollout checklist.
- 2) Integration PRD.
- 3) Monitoring dashboards + drift playbook.



# Thank you for your time!

Any questions? Drop us a line!

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