

AI PILOT EXECUTIVE BRIEF

AI Productivity Tool Deployment

USE CASE: White-Collar Productivity / Botsitting Risk Reduction

CLASSIFICATION: Pre-Activation | GRB Review & Project Team Planning

PROCESS STAGE: Step 2 — GRB Pre-Activation Review

ASSUMPTION: BTC AI Portfolio fully operational. Intake accepted. Pilot scheduled.

PURPOSE OF THIS BRIEF

This brief is produced by the PMO at Step 2 of the BTC AI Portfolio process — after the Governance Review Board has accepted the project and prior to PM activation. It serves two simultaneous functions: **(1) GRB confidence:** confirming no last-minute changes alter the activation decision; and **(2) Project team planning edge:** surfacing capability gaps, proof-of-concept scope, and interdependencies before the Planning phase begins. Pilot funding is scoped to this phase only. The pilot operates in sandbox; no PROD contact. Scaling requires a separate intake submission.

1. USE CASE SUMMARY

The organization is piloting AI-assisted productivity tools across a defined white-collar knowledge worker population. The stated objective is to recapture labor hours lost to manual, repetitive, and cognitive-load-intensive tasks. Industry research establishes the failure baseline this pilot must avoid: workers in ungoverned AI environments spend an average of 6.4 hours per week in "botsitting" - manually feeding context, correcting errors, and compensating for tools that lack organizational support infrastructure. Gross productivity gains of 11 hours per week erode to under 5 net hours when botsitting overhead is applied.

This pilot is the proof of concept. Success here informs — but does not fund — any scaling decision. A successful pilot result will require a new project intake submission to proceed beyond sandbox.

PILOT SCOPE AT A GLANCE

Pilot Type	Proof of Concept (Sandbox) - No PROD contact
Population Scope	Defined pilot group — enterprise-based, not org-wide
Funding Scope	Pilot phase only. Scaling requires separate intake.
Success Criteria	Net productivity gain (gross savings minus botsitting overhead). Governance incident rate. PoC viability determination.
Exit Condition	Closeout report submitted to GRB. Scaling decision deferred to new intake.

2. PORTFOLIO PROCESS CONTEXT

This pilot has been processed through BTC's standard AI Portfolio governance sequence. The brief is issued at Step 2 - the final governance checkpoint before PM activation.

STEP 1

New AI Project Intake

Project submitted through formal intake. Governance Review Board evaluates the request and renders an acceptance decision. Pilot scheduled within the active portfolio.

STEP 2

GRB Pre-Activation Review ← YOU ARE HERE

PMO issues this Executive Brief. GRB reviews it for any last-minute changes and major resource constraint availability that may alter the activation decision. Project team receives gap and interdependency intelligence before Planning begins.

STEP 3

PM Activation & PMO Lifecycle

PM activates the project. Standard phases follow: Initiation → Planning → Execution → Closeout. Monitoring & Control runs continuously from Planning through Closeout.

NOTE: When No AI Portfolio Exists

This brief assumes BTC's AI Portfolio is fully operational. In many organizations, no such infrastructure exists. Without an operational portfolio — with active governance, intake processes, and a sequenced project roadmap — AI pilots are evaluated and activated in isolation, with no visibility into capability gaps, interdependencies, or strategic alignment. In those environments, the first recommendation is not to run a pilot. It is to build the launchpad. Establishing a functional AI Portfolio typically requires a dedicated 6-month engagement before project-level work can be responsibly governed.

3. CAPABILITY GAP ANALYSIS

The following gaps have been identified against BTC's Capability Design framework. The project team should use this analysis during Planning to sequence pre-pilot remediation where required. The GRB should note any gap rated HIGH as a conditional activation risk.

CAPABILITY AREA	CURRENT STATE	GAP RATING	TEAM ACTION
Context Architecture	No organizational knowledge base or prompt library. Workers supply context manually per session.	HIGH	Define minimum context architecture required for PoC. Include build in pilot plan.
Output Standards & Review	No defined criteria for acceptable AI output. No review ownership assigned.	HIGH	Establish review standards and accountability loop before pilot goes live.
Governance & RACI	AI accountability roles undefined. Shadow AI risk untracked.	HIGH	Assign RACI for pilot scope. Define incident reporting path.
Workflow Integration	Tool sits alongside existing systems. Handoffs remain manual.	MEDIUM	Map minimum integration points required for PoC validity.
User Readiness	No baseline maturity measurement. Adoption targets set without readiness data.	MEDIUM	Administer AI readiness baseline to pilot population before launch.
Data Access & Permissions	Data sourcing for AI context not evaluated against compliance requirements.	MEDIUM	Validate data access scope against governance and compliance boundaries.

4. INTERDEPENDENCY FLAGS

The following initiatives may be underway within the portfolio and carry capability dependencies that intersect with this pilot. The project team should confirm status during Planning. The GRB should flag any active conflict for resolution before activation.

INITIATIVE	ACTION	DEPENDENCY NOTE
Data & Knowledge Management Initiative	CONFIRM	If a knowledge base or enterprise search project is active, context architecture being built there should feed this pilot - not be rebuilt in parallel.
IT Security / Acceptable Use Policy Update	CONFIRM	AI governance policies in development may restrict tool categories or data sharing in ways that directly constrain pilot scope. Resolve before pilot design is locked.
Other Departmental AI Pilots	MAP	Parallel pilots may be building shared capabilities — prompt libraries, LLM access layers, integration frameworks — that this pilot should inherit rather than duplicate.

HR / Workforce Transformation Program	TIMING	Adoption mandates tied to this pilot landing alongside AI-related role changes creates a politically charged environment. Coordinate timing.
Enterprise Data Platform / MDM Project	SEQUENCE	If a master data or platform initiative is underway, this pilot's context architecture should be sequenced behind it — not built in isolation.

5. GRB ACTIVATION CHECKLIST

The following conditions should be confirmed by the GRB before issuing activation approval. Items marked **REQUIRED** must be resolved or formally accepted as known risk prior to Step 3.

STATUS	CONDITION	GRB SIGN-OFF
REQUIRED	No material changes to project scope, funding, or team since intake acceptance.	☐
REQUIRED	HIGH-rated capability gaps acknowledged by project team with remediation plan included in pilot scope	☐
REQUIRED	Sandbox boundary confirmed. No PROD systems in scope for this pilot phase.	☐
REQUIRED	Pilot success criteria defined. Net productivity metric (not gross) established as primary measure.	☐
REQUIRED	Interdependency conflicts, if any, resolved or formally deferred with GRB notation.	☐
RECOMMENDED	AI readiness baseline administered to pilot population prior to launch.	☐
RECOMMENDED	Rough scaling estimate noted for record — not a funding commitment.	☐

6. PMO RECOMMENDATION

Based on the capability gap analysis and interdependency review, the PMO offers the following pre-activation guidance for both the GRB and the project team.

For the GRB	Activation is appropriate provided HIGH-rated gaps are acknowledged with a remediation plan embedded in the pilot scope. Confirm sandbox boundary and net productivity metric before signing off. Flag any unresolved interdependency conflicts for notation in the activation record.
For the Project Team	Enter Planning with the gap analysis in hand. The three HIGH-rated gaps — context architecture, output standards, and governance RACI — should be addressed in the pilot plan before execution begins, not discovered mid-sandbox. Map interdependencies in the first Planning session. Inherit before you build.
On Scaling	This pilot is the proof of concept. A successful result does not automatically authorize scaling. Scaling requires a new intake submission, a new GRB evaluation, and a separate funding decision. A rough order-of-magnitude estimate may be included in the closeout report as a planning signal — not a commitment.

Everyone wants the rocket. We build the launchpad