CreativeOps Alliance
CreativeOps: Process. Impact. Excellence

AI Pilot Checklist

A 1-page guide to run a safe, useful 30-60-90 pilot for creative teams

Pick one narrow use case

- Choose a single pain point with clear outputs (draft creative briefs, tag assets in DAM, summarize stakeholder feedback).
- Define success: 20–30% faster turnaround or 10–15% higher first-pass approval rate (pick one).
- Nominate an owner and 3–5 pilot participants.

Establish guardrails

- Create a human-in-the-loop rule: nothing ships without human review.
- Brand voice: provide examples of on-voice and off-voice outputs.
- Data: use only approved, non-sensitive inputs; document any PII restrictions.
- IP: clarify what's allowed (no training on client-owned material without permission).

Baseline & metrics

- Capture pre-pilot numbers for 2 weeks: cycle time, first-pass approval rate, rework %, and throughput.
- Decide weekly reporting cadence and who sees it.

Tooling & access

- Select the minimum viable tool (start with one).
- Provision accounts, turn on logging, and restrict exports as needed.
- Create a shared workspace for outputs and QA comments.

Pilot workflow (Day 1–60)

- Document the 5–7 steps from request → AI draft → human edit → approval.
- Provide prompt templates and examples.
- Require QA: checklist, rubric (accuracy, tone, compliance), sign-off.

Training & enablement

- 30-minute kickoff: why this, how it helps, what 'good' looks like.
- 10-minute weekly huddle: wins, misses, adjustments.

Decision gates (Day 60–90)

- Scale if targets met; iterate if close; stop if risk > reward.
- If scaling: update RACI, SOPs, and add to onboarding.
- Share outcomes with stakeholders (before/after samples + metrics).

Risks & quick fixes

- Hallucinations → tighten prompts, add source checks, keep HITL.
- Off-brand tone → add style guide examples; mandate edits.
- Low adoption → narrow scope, show side-by-side time saves.
- Privacy concerns → sanitize inputs; use approved environments.