Seven Day AI Pilot Guide

Use this card during the workshop. Then test one workflow for seven days, including human review and any manual transfers. A phone, paper, or an existing AI account is enough to begin.

Find your Anchor Use Case

Business and owner _____

My repetitive task _____

It happens _____ times per week. Today each case takes _____ minutes.

My target is _____ minutes per case, including checking and correction.

Choose your approach

Plan A integrated paid system / Plan B modest paid tools / Plan C free with manual handoffs

Selected approach and reason _____

Existing tools I can use _____

Software budget _____ Setup time budget _____ Review date _____

Build the workflow

Trigger _____

Input _____

AI job and matching prompt ID _____

Output _____

Human reviewer and exact checks _____

Next action after approval _____

Scale through a small test

Data allowed in the tool _____

One failure and manual fallback _____

Success criteria beyond speed _____

Test a routine case, a case with missing details, and an exception. Record time and corrections. Continue, revise, or stop after reviewing the evidence. If cases are scarce, extend the pilot.

Your seven day plan

Day	Action	Result to keep
1	Choose the task. Time three representative cases using the current process when possible.	Baseline, volume, inputs, and quality standard.
2	Check existing tools. Select A/B/C. Name the owner and data rules.	Approach, budget, and biggest assumption.
3	Prepare the prompt and inputs. Run one safe sample. Write the human checkpoint.	Draft workflow and one corrected output.
4	Run the normal, incomplete, and exception cases. Review every result.	Time log, failures, and fallback behavior.
5	Fix the most important issue. Try a comparable case again.	Prompt/workflow version and change made.
6	If relevant, ask a colleague to try it from written instructions. Otherwise repeat it yourself.	Confusion, access problems, and documentation gaps.
7	Compare quality, time, costs, and setup effort. Choose continue, revise, or stop.	Decision, owner, next action, and check-in date.

Useful test conditions

Use approved tools and permitted, minimized data. Keep customer-facing drafts under review during the pilot. Stop a test that exposes inappropriate data or creates an unapproved external action. Three cases are a starting point, not proof of dependable automation.

Decision rules you set before testing

Continue when the owner sees worthwhile net time savings and outputs meet the defined quality standard. Revise when errors appear fixable or the sample is incomplete. Stop when the task remains costly to check, consequences are too high, or the process does not improve. A sample target might be zero invented commitments in approved messages and a reduction in total minutes per case.

Your next thirty days

Week 2: repeat comparable cases and refine the instructions. Week 3: document ownership and train another user if needed. Week 4: decide whether a paid tool or connected handoff adds enough value. Expand only after checking output quality, access, costs, and fallback behavior.

Pilot log and decision

Use comparable cases. Baseline means the estimated or measured time for the same kind of task without AI. Label estimates. AI total includes preparing inputs, generation, human review, corrections, and transfers. Do not double-count the review time.

Case and date	Baseline min	AI total min	Accepted or corrected	Issue and change
Routine				
Missing details				
Exception				
Retest				
Additional case				

Measure time and value

Total baseline minutes _____ Total AI minutes _____

Net minutes recovered = baseline total - AI total = _____

Average net minutes per comparable case _____

Projected weekly minutes = average net minutes x weekly cases = _____

Setup minutes _____ Incremental software cost per month $_____

Optional hourly capacity value $_____

Illustration: 20 cases/week x (8 - 3 minutes) = 100 minutes/week recovered. At $40/hour, this is about $66.67/week of capacity value. This is a projection until measured, and it becomes cash savings only when spending actually falls. Compare costs over the same period and include setup effort.

Day seven decision

Continue / Revise / Stop / Extend for more representative cases

Evidence for the decision _____

Quality problems or missing evidence _____

Next action and owner _____

Next check-in date _____

Optional prompt P11 can help interpret the log. Verify its arithmetic and reasoning. Keep the original examples so you can inspect what happened. Resources: ai4smallbiz.org.