

Operational pilot charter

ENTERPRISE / Example: assess a material-flow use case

Situation

An illustrative operations team is considering automation for a defined material-flow process at one site. No performance results or client engagement are represented.

Objective

Decide whether the use case merits a scoped pilot. Establish comparable baseline data, operating constraints, responsibilities, and a reviewable acceptance process.

Proposed scope

- Define the process boundary, operating envelope, and affected roles.
- Record client, vendor, integration, and specialist responsibilities.
- Agree pilot measures, test conditions, and evidence requirements.
- Plan operator readiness, escalation, fallback, and operational handoff.

This charter does not authorize equipment changes or site operation. Safety validation, manufacturer requirements, and implementation permissions remain with the designated responsible parties.

Evidence to review

Measure	How to evaluate it
Operating performance	Choose a comparable cycle-time or throughput measure.
Reliability	Record interruptions, manual interventions, and recovery effort.
Readiness	Review action closure, operator competence, and handoff evidence.

Decision gate

At each agreed stage, the responsible client and vendor owners review the evidence and authorize proceed, revise, or stop. An unresolved blocker remains explicit.

Decision-gate worksheet

Use this worksheet to shape the conversation. Owners, thresholds, dates, and approvals are set for the actual engagement.

Review and test structure

Review item	Required evidence or expected behavior
Baseline agreed	Process boundary, measurement method, operating conditions, and data owner documented.
Ready for pilot	Access, safety responsibilities, dependencies, fallback, and test conditions approved.
Pilot reviewed	Results compared with the baseline; exceptions and limitations recorded.
Ready for handoff	Documentation, training, open actions, escalation, and support ownership accepted.

Ownership to confirm

Role	Example responsibility
Client sponsor	Owns the business decision and acceptance process.
Operations / IT owners	Confirm site dependencies, access, integrations, and change approval.
Vendor / specialists	Confirm equipment requirements and their agreed technical responsibilities.

Decision record

Record: stage / evidence reviewed / unresolved issues / decision / approver / next owner / next review date.

Open questions / next actions