Industrial pilot requirements brief

Bound the decision and its operating context.

Pilot reference	Accountable owner role	Review date

01 Scope and decision

Name the bounded process or asset group, the decision to improve, the proposed benefit as a hypothesis, and clear exclusions.

02 Baseline and observation window

Describe the present process, comparable operating conditions, baseline source and dates. Identify missing reference evidence and the review window.

03 Stakeholders and responsibilities

Name responsible roles for the process, operations, engineering, IT/OT, security, purchasing and any proposed provider. Who approves each handover?

04 Physical and operational boundary

Record site access, qualified installation responsibility, permitted monitoring, change approval and recovery arrangements. Separate observation from control.

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Define the evidence and the delivered scope.

Keep proposed scope, documented facts and observed results distinct. Attach longer evidence separately.

05 Measurement and data quality

Define source identity, time/zone, units, frequency, operating context, reference method and missing, stale or unsuitable-data states.

06 Access and data handling

Describe approved access, data ownership, storage/export, retention, provider access and end-of-service handling. Record unresolved questions.

07 Acceptance and evidence plan

List the setup, expected observation, actual-result record and reviewer for each test. Include false exceptions, missing data and response workload.

08 Provider and delivery scope

Identify exact proposed equipment/software/market, delivered services, installer/operator roles, exclusions, handover evidence and support terms.

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Agree how the pilot will be operated and closed.

Keep proposed scope, documented facts and observed results distinct. Attach longer evidence separately.

09 Continuing operation

Assign routine review, fault investigation, updates, replacements, training and support ownership. Who keeps the system useful after the trial?

10 Cost and assumptions

State the evaluation horizon and dated sources for setup, connectivity, software, support, maintenance and exit. Keep uncertain amounts separate.

11 Sharing and required permission

Record the purpose and approved recipients for a non-confidential brief. Identify required confidentiality, data-use or personal-data permissions before sharing.

12 Go/no-go, recovery and exit

Write evidence-based expansion/stop criteria, decision owner, review date, remaining limitations, recovery responsibility and practical export/exit steps.

Save a local copy. Use role names and a non-confidential example. Do not include credentials or raw plant data.

This brief records questions and responsibilities. It does not approve site work or establish a financial return.

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