PRACTICAL RESOURCE / STARTUPCOACH

Concierge Ai Pilot Worksheet

Save a copy and agree the relevant details with your pilot participant. The worksheet organizes a test; it is not a substitute for suitable commercial or data-handling terms.

1. Customer Result

Customer group and task:

Recognizable output:

What the customer will do with it:

What would make it unusable:

What we need to learn:

2. Pilot Charter

Start / finish / review date:

Number and timing of deliveries:

Required inputs and access:

Work performed manually:

Work assisted by AI:

Human review and approval owner:

Scope, exclusions, and change requests:

Price or explicit free arrangement:

Relevant cancellation / refund / continuation terms:

Data permissions, access, retention, and deletion:

Exception and escalation process:

3. Baseline

Current workflow and boundaries measured:

Frequency and people involved:

Active effort and elapsed time:

Quality problems and consequences:

Which figures are measured and which are estimates:

Agreed success conditions:

4. DELIVERY LOG (repeat for each request)

Request code and date:

Input complete? If not, what was missing?

Human minutes, including review and chasing inputs:

Tool usage / direct cost:

Corrections, exceptions, and unresolved questions:

Quality check and reviewer:

Customer action after receiving the result:

Customer feedback and next request:

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5. Decision

Evidence of usefulness:

Evidence of willingness to pay:

Evidence about repeatability:

What this manual test cannot establish about software:

One bounded step that may be automated:

Representative normal, messy, and declined cases for evaluation:

Fallback owner and stop condition:

Decision: continue / narrow / change model / stop

Next owner and review date:

Keep human-delivered service evidence separate from autonomous software performance. Do not hide manual work or infer product-market fit from a handful of pilots.

Guide: https://startupcoach.cc/journal/test-ai-startup-concierge-mvp

StartupCoach editorial | October 2026