Agree the decision the pilot must support

A bounded pilot should show whether the product improves a real review or handoff, and what it would take to operate it in the selected business unit.

Choose a starting scope

Secure: one service or segment and a known inventory question. Assure: one repository and an agreed source-review case set. SOAR: one investigation with reproducible input and an operational owner. Add a combined workflow only when asset, service and source mappings can be verified.

Define the engagement before collecting data

Name the BU sponsor, service or repository owner, analyst lead, approver and product team contact. Agree authorized inputs, exclusions, data location and retention, permitted methods, operating window, dependencies and recovery contact. Access is an explicit pilot input; SOAR proposes, and production changes stay with your team.

Stage 1: Establish

Work together: Agree the case set, scope, existing process and success thresholds before results.
Evidence for the next decision: Scope sheet, permissions, baseline effort and reviewers.

Stage 2: Compare

Work together: Ask equivalent questions using the same input and time basis through both processes.
Evidence for the next decision: Reproducible results, analyst time, corrected conclusions and coverage.

Stage 3: Challenge

Work together: Use controlled cases with stale input, ambiguity, an empty result or failed dependency.
Evidence for the next decision: Visible limits, correct refusal or escalation, and unsuccessful attempts.

Stage 4: Decide

Work together: Reconcile results, operating effort, integration work and unresolved risks.
Evidence for the next decision: A recommendation to expand, narrow, pause or stop, with reasons.

A practical starting schedule

A four-week outline can allocate week one to scope and baseline, week two to a first review, week three to challenges and repeat runs, and week four to evaluation and handover. This is a proposal; agree duration, staffing, cost and prerequisites for the selected BU.

Both sides know what is being evaluated, who owns the work and what evidence will support the decision.

Measure the work and leave a usable record

The pilot succeeds when the customer can judge the result independently, including cases that did not work.

Evidence quality

Evidence to compare: Traceability, reviewer corrections, unresolved gaps and evidence freshness.
Ready when: Another reviewer can reproduce the conclusion and see its limits.

Operating effort

Evidence to compare: Setup time, review time, handoff quality, repeat effort and named ownership.
Ready when: The accountable team can repeat the workflow within the agreed operating model.

Control readiness

Evidence to compare: Access, retention, recovery, configured integrations and SOAR approval by risk class.
Ready when: Prerequisites and stop conditions are explicit before another BU is added.

Pilot outputs

Retain scope, permissions, supported exports, evidence references, coverage, decisions, owners and the final evaluation. Production changes stay with your team: keep your own change record and a later Secure or Assure run. Agree input retention and deletion at close.

Several business units

Keep BU scopes and permissions separate. Summarize authorized results with evidence dates, service identifiers and gaps. Name shared-service owners and sharing rules. Validate automated reporting; label an initially manual group summary clearly.

Expansion criteria

Use the scorecard to choose expand, narrow, pause or stop. Record who made the decision, the evidence behind it, unresolved integration or control gaps and what would change the recommendation.

Prepare the first working session

Bring the BU and service, review question, available inputs, current process, desired outcome, owner and calendar constraints. Agree scope and success measures; handle legal and commercial terms separately.

The customer can judge adoption and identify the work needed for the next BU.