



AI PILOT SCALING CHECKLIST

A practical self-assessment across the six data and context foundations that carry a proven pilot into an enterprise capability.



Scaling an AI pilot is all about the data underneath it. McKinsey finds that nearly two-thirds of enterprises have experimented with AI agents, and the organisations turning that into real, sustained value are consistently the ones that treated data as the foundation from day one, fewer than 10% have scaled agentic AI to deliver tangible value so far, and eight in ten point to data limitations as the reason. Gartner's research points the same way: it predicts over 40% of agentic AI projects will be cancelled by the end of 2027, driven by escalating costs, unclear business value and inadequate risk controls rather than the underlying technology.

This is exactly where emite comes in. We're not an AI pilot company — we're a data and context company, and the six foundations below are the ones we see make the difference between a pilot that stalls and one that scales. This checklist turns them, drawn from "How to Scale a Successful AI Pilot," into a practical self-assessment you can run against any pilot you're considering taking further.



HOW TO USE THIS CHECKLIST

- **Score each question from 0 to 2:**
0 = not in place,
1 = partially in place or in progress,
2 = fully in place.
- **Be honest rather than aspirational, this is most useful as a diagnostic, not a scorecard to pass.**
- **Total your score within each of the six sections, then add them together for an overall score.**
- **Use the scoring guide at the end to identify where to focus before scaling further.**

1. BUILD ON TRUSTED DATA

Clear, consistent definitions and reliable data quality controls.

QUESTION	SCORE (0–2)
Do you have a documented, shared definition for every core metric this pilot relies on (e.g. “customer,” “interaction,” “service level”)?	-----
Would two different teams pulling the same metric today get the same number, and could they explain why if not?	-----
Is the data feeding this pilot subject to ongoing quality or validation checks, rather than a one-off clean-up?	-----
Is ownership for each data source clearly assigned to a named team or role?	-----



2. CONNECT THE WIDER BUSINESS CONTEXT

Progressively enriching the context available to the use case.

QUESTION	SCORE (0-2)
Have you identified which additional systems this use case would benefit from being connected to next?	-----
Does the pilot already draw on more than one data source, or is it still running on a single one?	-----
Is there a plan, even an informal one, for progressively enriching the context available to this use case?	-----
Can you trace how a decision made using this pilot maps back to the underlying data sources?	-----

3. CREATE REUSABLE DATA AND INTEGRATION FOUNDATIONS

A shared foundation rather than a one-off path to each source.

QUESTION	SCORE (0-2)
Was this pilot's integration built in a way that other teams or use cases could reuse it?	-----
Is there a shared data and integration layer in your organisation, or does each new AI initiative build its own path to source systems?	-----
If this pilot succeeds, would the next team building on it start from a foundation, or from scratch?	-----
Are your integrations resilient to changes in source systems (API updates, schema changes) without manual rework?	-----



4. DESIGN GOVERNANCE INTO THE ARCHITECTURE

Access, approval and oversight built in from the start.

QUESTION	SCORE (0-2)
Are access permissions for this pilot's data defined by role, rather than informal norms?	—
Is there a clear answer to “what actions can this AI take without human approval?”	—
Are AI-generated recommendations or actions logged and auditable?	—
If this capability were used by three times as many people tomorrow, would current controls still hold?	—

5. MAKE INTELLIGENCE RELEVANT TO THE PERSON USING IT

Persona-based relevance, not one experience for everyone.

QUESTION	SCORE (0-2)
Does this pilot currently show the same information to every user, regardless of role?	-----
Have you mapped the different roles who might use this capability and what each actually needs from it?	-----
Is there a plan for tailoring detail, access or framing by persona as adoption grows?	-----



6. CONNECT INSIGHT TO ACTION

Measuring what the organisation does differently, not just usage.

QUESTION	SCORE (0–2)
Can you point to a specific action or decision that has changed as a result of this pilot?	-----
Is there a defined owner responsible for turning this pilot's insights into operational action?	-----
Do you have a way to measure the business outcome this pilot is meant to influence — not just usage metrics?	-----

Your Score

Add up your scores across all six sections (maximum 44). Then find where you land below.

0–14	Foundation stage You're proving the use case — now's the time to put the data foundations in place before scaling further. Start with Foundation 1 (trusted data); it underpins everything else on this list.
15–29	Scaling-ready with gaps Real foundations are already in place. Focus on your lowest-scoring section next to close the specific gaps that would otherwise surface as more people, systems or decisions come to rely on this capability.
30–44	Scale-ready The foundations are largely in place, and the data underneath this pilot is doing its job. This is a strong candidate to move from a single use case toward a broader, connected intelligence capability.



NEXT STEPS & ADDITIONAL RESOURCES TO HELP YOU SCALE YOUR AI PILOT

Read the full breakdown of each foundation in

“How to Scale a Successful AI Pilot,” Blog.

<https://www.emite.com/blogs/>

For a deeper technical view, download

“The Orchestration Architecture Playbook”

It covers the seven-layer architecture behind orchestrated intelligence.

<https://www.emite.com/blogs-ebooks/>

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