

Pilot Plan

One rule. One operating context. 30 days. Verified weekly.

Purpose

A simple, low-disruption way to prove a single operating rule inside one operating context. No new systems, no added headcount, no proxy metrics, and no new spreadsheets for verification. We freeze one rule for 30 days, verify movement weekly from an existing report or saved view using the exact field or column label, then make a Day 30 decision: Pass or Stop for a standalone Pilot, or Pass or Tighten if formalised into the Profit and Cash Constraint Consult. Fee is \$1,000 + GST.

Client and Operating Context

Client: Operating context:

Frozen Rule

Frozen operating rule (one sentence, definitive, no "try harder"):

Source Report

Source system:

Exact report or saved view title or path:

Filters and date range exactly as set:

Exact field or column label we will read weekly:

Ownership and Cadence

Verification owner: Backup:

Weekly snapshot day and time (exact):

Day 30 readout booked: at

Baseline and Threshold

Baseline value at Week 0 from the source report:

Day 30 Pass threshold (binary):

Verification

We read only from existing reports or saved views you already trust. The Day 30 signal is binary and visible in under 60 seconds from the same report or saved view, same field, same day.

Applicability and Exclusions

Applicability:

Exclusions and legitimate exceptions:

Exceptions Path

If the weekly snapshot is missing or late, the Verification owner resolves within 24 hours. If not resolved, the designated escalation contact sends a single prompt. If still not received within 24 hours, the stop condition review is initiated and the Day 30 Pass condition is considered not met unless verified within the same weekly window.

Decision at Day 30

Decision options for a standalone Pilot: Pass or Stop. If formalised into the Profit and Cash Constraint Consult: Pass or Tighten only.

Decision rationale (one or two sentences):

Next action if Pass:

Next action if Stop or Tighten:

Start the Operating Context Pilot Intake. Complete the intake to receive the Letter of Agreement.

Sign-off

Finance Sponsor (name and title):

Accountable Operator (name and title):

Decision date: