

The One-Page Pilot Charter

Complete and sign this before the pilot begins. If you fill it in afterward, you have notes, nothing more. The point of signing in advance is that the bar gets fixed while the people deciding can still be honest about where it belongs. Keep this decision charter to one page and place the technical detail in the Governance and Measurement Annex. Paper has limits too.

The reasoning behind every line is in The Last Human Coach, Chapter 9.

Pilot identity

Product and version: _____ Vendor: _____ Sponsor: _____ Pilot lead: _____

Dates: _____ to _____

Eligible population: _____ Number invited: _____ Target enrollment: _____ Selection or invitation method: _____

Purpose

This pilot is designed to determine whether _____ deserves _____.

This pilot will **not** establish _____.

That second sentence is essential.

Tier 1 gates

Privacy and data governance — no employer access to individual coaching content by default; disclosed exceptions; aggregate thresholds; verified data lifecycle and security. Passed: ☐

Safety and human handoff — scripted tests passed; real destinations confirmed; consent and response process defined. Passed: ☐

Stop authority — named person authorized to suspend the pilot immediately: _____

Three decision signals — thresholds written now, before any data

Meaningful engagement — do eligible participants use and voluntarily return to the service for real leadership situations? Threshold: _____

Early application and transfer — do participants report trying something different, and is there supporting behavioral evidence? Threshold: _____

Trustworthy operation — did privacy, safety, fairness, reliability, and operational requirements hold? Threshold: _____

Satisfaction is tracked as experience, not as proof of development. It clears no threshold on its own.

Decision rules

We will **SCALE** if: _____

We will **EXTEND** only if: _____ (name the single uncertainty the extension will settle, or "extend" means "stop")

We will **STOP** if: _____ (any Tier 1 gate fails, at any point)

Signatures

Sponsor: _____ Pilot lead: _____ Privacy/security lead: _____ Date: _____

Technical detail — version freeze, update and rollback, data flows, comparison design, follow-up dates, amendments — lives in the Governance and Measurement Annex, not on this page

This instrument accompanies Chapter 9 of The Last Human Coach: How AI Brings Coaching to Every Manager by Stefano Calvetti, where the reasoning behind every line is explained in full.