

**PILOT** | SECURE · ASSURE · SOAR PILOT EVALUATION · 01 / 02

A PROPOSED EVALUATION FOR ONE BUSINESS UNIT

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 and any execution authority are explicit pilot inputs.

STAGE

Establish

1

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

Compare

2

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

Challenge

3

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

Decide

4

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.

WHAT THIS ENABLES

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

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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.

DECISION LENS

Evidence quality

1

EVIDENCE TO COMPARE

Traceability, reviewer corrections, unresolved gaps and evidence freshness.

READY WHEN

Another reviewer can reproduce the conclusion and see its limits.

DECISION LENS

Operating effort

2

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.

DECISION LENS

Control readiness

3

EVIDENCE TO COMPARE

Access, retention, recovery, configured integrations and any authorized execution checks.

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. If execution is included, retain authorization, receipt, recovery outcome and fresh verification. 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.

WHAT THIS ENABLES

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