FIELD GUIDE / AI EVALUATION

Scope a useful non-emergency AI pilot

A practical pilot starts with a narrow task, a trusted source of information, and a clear route to a person. Use this guide to evaluate fit and readiness before considering a wider rollout.

01 Choose a bounded administrative task

Describe the call type and the approved response process. Start with a task that can be clearly explained and evaluated. Keep emergency call taking outside this planning scope and define how unexpected requests should reach a human.

- Routine task and the callers it serves.
- Questions the workflow is permitted to address.
- Questions and situations that must be handed off.
- Agency owner responsible for the approved scope.

02 Establish the information source

Identify the information the workflow may use and who keeps it current. Avoid relying on an answer that sounds plausible without confirming it against an approved source. Plan how updates and temporary changes will be handled.

- Approved reference material and responsible owner.
- How changes are reviewed before use.
- What the system should do when an answer is missing or uncertain.
- Any information that should be collected and why it is necessary.

03 Design the route to human help

Escalation is part of the task, not an exception to planning. Describe when a person should take over, how the handoff works, and what happens if the intended destination is unavailable.

- Caller asks for a person.
- Request is outside scope or cannot be understood.
- Information is unavailable or uncertain.
- Handoff destination and fallback process.

04 Evaluate representative scenarios

Confirm product availability and supported configuration before testing. Use agreed scenarios covering in-scope questions, ambiguity, interruptions, incorrect assumptions, and handoffs. Record the observed outcome and the changes required.

- Expected handling for each scenario.
- Observed response and whether it matches approved information.
- Escalation behavior and completion of the handoff.
- Failures, unresolved conditions, and required retesting.

05 Decide on readiness with an owner

A pilot should end in a documented decision, including reasons to continue evaluating or stop. Define what your agency needs to see before expanding the scope. Keep review, updates, and operational ownership explicit.

- Acceptance criteria and evidence.
- Known limits and conditions of use.
- Responsible person for monitoring and changes.
- A bounded expansion plan only after the original task is validated.

PUT THE GUIDE TO WORK

Use this guide to shape your agency’s evaluation and working discussions. Confirm product availability and supported configurations with Equature.

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