

FICTIONAL EXAMPLE

Monthly AI Executive Report

Fractional Chief AI Officer - Sample Month 3

This sample demonstrates the type of concise management reporting that can accompany a Fractional Chief AI Officer retainer. All names, metrics, decisions, and results are illustrative.

Client	Gulf Coast Precision Components, Inc. - fictional
Reporting period	September 2026
Executive sponsor	COO
Retainer capacity	20 hours
Capacity used	17.5 hours
Overall status	On track with two items requiring executive decision

1. Executive Summary

The AI program remains on track. Two controlled pilots are active, the vendor review process is now being used for material AI features, and the Steering Group completed all scheduled decisions this month. The largest near-term issue is resource contention between the maintenance assistant pilot and a separate ERP upgrade. Management should confirm which initiative has priority before additional pilot users are added.

Indicator	Status	Management message
Roadmap execution	Green	5 active priorities; no ownerless items
Governance operation	Green	Steering Group met; decisions recorded
Pilot evidence	Yellow	Maintenance pilot needs larger reference set
Vendor exposure	Yellow	One vendor contract issue remains open

2. Decisions Required

ID	Decision	Owner	Due	Recommendation
D-031	Prioritize maintenance pilot or ERP resource request	COO	Sep 20	Protect ERP critical path; cap pilot at current users
D-032	Approve conditional vendor renewal	CFO / IT	Sep 24	Renew only with retention and change-notice language
D-033	Authorize RFQ summarization pilot	VP Operations	Sep 30	Approve 60-day controlled pilot

3. Portfolio Status

Use case	Stage	Owner	Value signal	Risk	Next gate
Procedure assistant	Live, limited	HR/Operations	FAQ volume down 22%	Low	60-day review
Maintenance assistant	Pilot	Maintenance	Search time down 18% in sample	Medium	Expand test set
RFQ summarization	Ready	Engineering	Baseline complete	Medium	Executive approval
Customer email drafting	Limited use	Sales Ops	Editing time down 12%	Medium	Quality sample
Predictive scheduling	Deferred	Operations	Not measured	High	Revisit after ERP

4. Value and Performance Signals

Metric	Current	Prior month	Comment
Active approved use cases	4	3	RFQ pilot prepared
Measured pilots	2	1	Maintenance added
Estimated gross time saved	46 hrs	31 hrs	Before correction/review cost
Correction / review effort	14 hrs	10 hrs	Tracked for net benefit
AI-related incidents	0 material	0 material	One minor policy question
Vendor reviews open	1	2	One closed this month

Note: time-saved values are management estimates until validated against a longer baseline. The Fractional CAIO reports assumptions separately from confirmed business results.

5. Risks and Open Issues

ID	Issue	Exposure	Owner	Action
R-014	Vendor retention language unresolved	Medium	IT / Legal	Close before renewal
R-018	Maintenance reference set too small	Medium	Maintenance	Add 50 representative records
R-021	ERP and AI pilot competing for analyst time	Medium	COO	Set priority
R-024	One team requested unapproved browser extension	Low	IT	Block and route through intake

6. Work Completed This Month

- Prepared and facilitated the monthly AI Steering Group meeting.
- Completed one vendor review and issued one conditional recommendation.
- Defined measurement plan for the maintenance knowledge assistant.
- Completed baseline for the RFQ summarization pilot.
- Reviewed two new use-case requests and deferred one as premature.
- Updated roadmap, decision register, risk register, and executive metrics.

7. Next 30 Days

- Resolve ERP versus maintenance pilot resource priority.
- Close vendor contract and retention questions.
- Launch the RFQ summarization pilot if approved.
- Expand maintenance pilot evidence set and rerun evaluation.
- Prepare quarter-end roadmap and investment reset.
- Review whether the customer email drafting use should expand, remain limited, or stop.

8. Retainer Capacity

Activity	Hours	Comment
Executive / Steering Group	4.0	Preparation, meeting, decisions
Use-case and pilot work	6.5	Maintenance and RFQ
Vendor / risk review	3.5	Two vendor matters
Roadmap, reporting, sponsor support	3.5	Weekly check-ins and report

Total used: 17.5 of 20 reserved hours. Unused capacity expires at month-end under the standard retainer unless otherwise agreed.