

How to Successfully Implement New Technology into the Workplace

Prove value and understand the logistics of implementing a new digital tool.

What is a Pilot Program?

A planned and structured effort by users with a formal test plan and feedback loop.

Pilot Program Goal

Validate the people, resources, and procedures required for a successful, large scale deployment.



Six Steps to a Successful Pilot Program

01/ Pilot Logistics

• Stakeholders

Who is needed for success and approvals?

• Define Use Cases

What situations and team members will benefit from this new tool?

• Set Goals & Define Success for Pilot

What KPIs are measured? How long should the pilot run to gain actionable data?

• Leverage Roadmap

Where does this tool fit into the bigger picture?



Use our **Trial Program Planning Worksheet** to identify your team, goals, and values needed to pitch executive stakeholders and secure budget and support for your new tool and pilot program.

02/ Pilot Participants



• Choose Participants

Choose employees with a cross-representation of roles and use cases.

• Follow Best Practices

Select participants who have proven to be positive and proactive about new processes. They will be your internal champions.

03/ Formalize a Test Plan



• Testing Cadence

Schedule regular check-ins with trial participants.

• Examine and Assess

Identify a feedback loop for user sentiment. How will pilot participants submit feedback?

04/ Create Awareness



• Educate Participants

How will you inform participants of expectations? How will you implement training?

• Manage Up

How will you inform stakeholders of progress, results, and recommendations?

05/ Launch Pilot



• Remain Agile

You have already prepared for success with a plan, but don't be afraid to pivot if early feedback provides actionable insights needed to adjust for success.

06/ End of Pilot



• Document and Inform

Report the data and any new questions or learnings.

Make sure stakeholders know and are preparing for next steps.

Celebrate your wins!

• Land and Expand

Roll out your scaled launch plan.

Congratulations!

You've taken the time to fully examine and establish the resources needed for a full-scale deployment of your new digital tool.



Check out our guidance on **How To Successfully Implement Technology Into the Workplace** to ensure a seamless implementation and adoption of your new digital tool.