


How to Run a Pilot

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 **Cherry Bekaert**^{LLP}
Your Guide Forward

1

The Anatomy of a Pilot

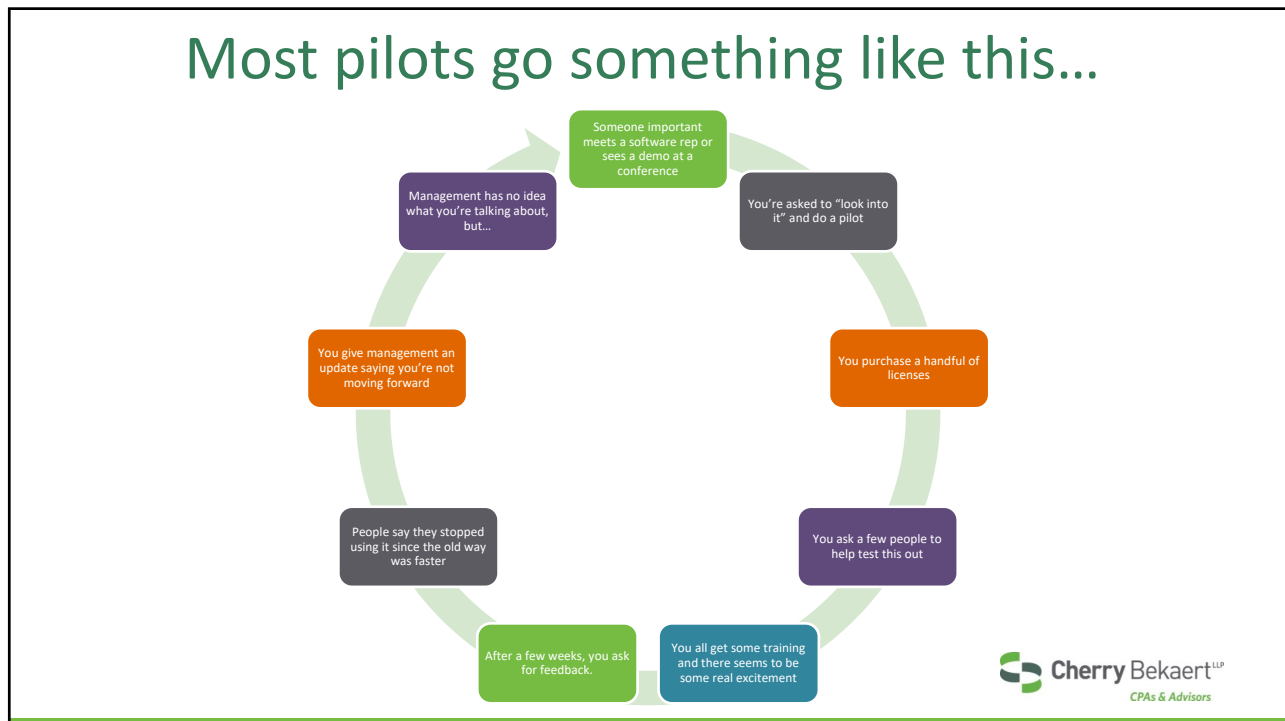
- ▶ **Why** – are you solving a clear problem with specific goals?
- ▶ **When** – are there clear timelines for each phase?
- ▶ **How** – is there a clear framework to follow?
- ▶ **Now what** – are there clear criteria on go/no-go?




3



4




5



The best way to avoid a failed pilot...

Don't run the pilot


6



6

Before you do anything...

- ▶ Identify the root problem and/or desired behavior.
 - If the group understands the problem, the feedback you get from the pilot will be very valuable.
 - If they are asked to give general feedback it may not be very valuable.
- ▶ Software may not be the best solution. Process change might be.
- ▶ Talk to other companies often!



7

7

Always start with a charter!

- Executive Sponsor
- Business Lead
- Advisors

8



8

WHEN



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9

Timelines

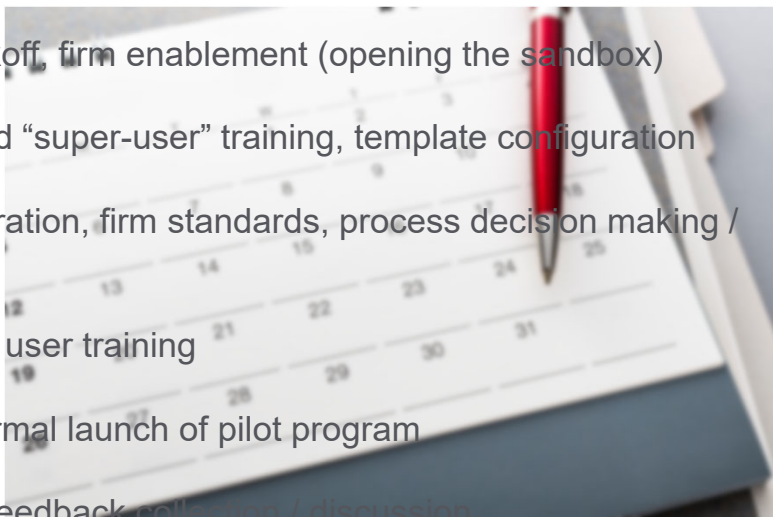
- ▶ Duration – 3 to 6 months
- ▶ Diversity
 - Engagement size
 - Engagement scope
 - Industries
 - Geographic Location
- ▶ Timing – 4 to 6 weeks prior to a busy cycle
- ▶ Duration
 - Long enough to get a representative sample of work
 - 3 is the magic number



10

Example Timeline

- ▶ Week 1: Project kickoff, firm enablement (opening the sandbox)
- ▶ Weeks 2: Formalized “super-user” training, template configuration
- ▶ Week 3-4: Data migration, firm standards, process decision making / documenting
- ▶ Week 5: Formalized user training
- ▶ Week 6: Go live / formal launch of pilot program
- ▶ Week 7+: Ongoing feedback collection / discussion



11



11

Live Example

Proposed Schedule



12

HOW

13

Decision Criteria

- ▶ Figure this out FIRST (you can change your mind later)
- ▶ Tie it to the Why
- ▶ Identify metrics

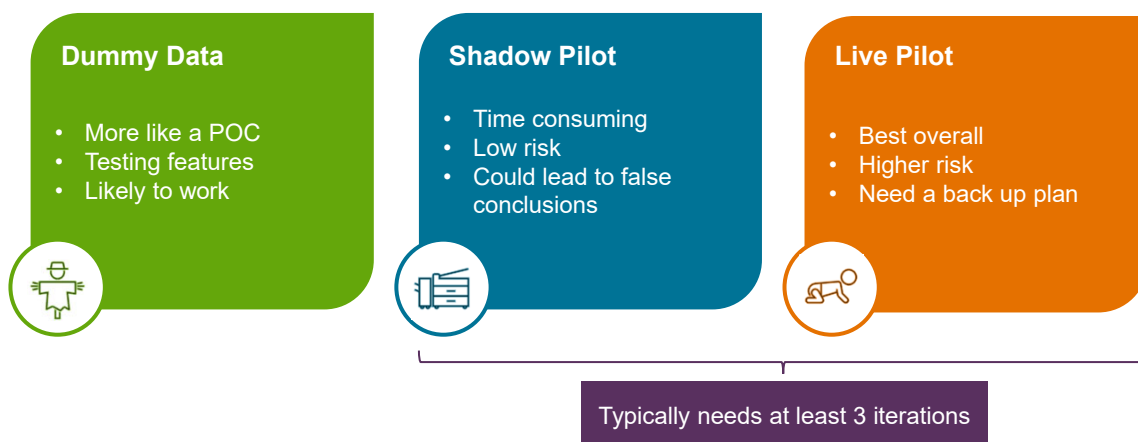


14



14

Pilot Structure



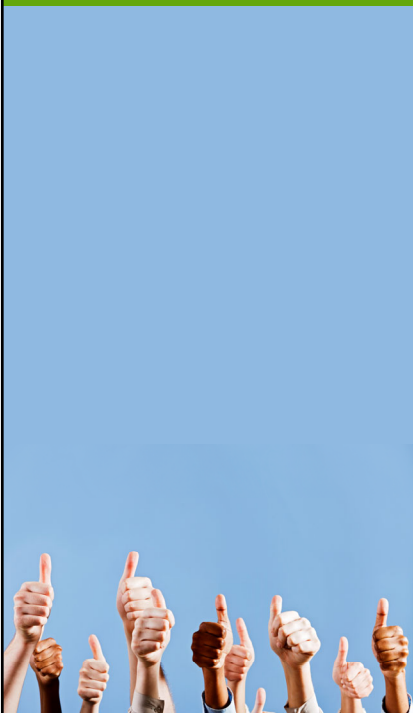
15



15


Identify the Right Test Group

- ▶ Not just the end users
- ▶ Executive support is crucial on helping identify participants
 - Determines correct voices
 - Adds credibility to effective participation
 - Introduces the 'why' during the kickoff
- ▶ Needed voices
 - The passionate few (early adopter program)
 - Resisters
 - On the fences





16

Can vs. Will




Can it work?

- Early adopters
- Helpful during the pilot
- Setup an early adopter group



Will it work?

- Late adopters
- Helpful at implementation
- Gives a preview of resistance at rollout



17

Check-Ins



- ▶ Group Size
- ▶ Alone / Together
- ▶ Phased Input
- ▶ Report out order
- ▶ Neutral Facilitator

18



18

Live Example

AuditMiner Pilot Check-Ins

The screenshot shows the AuditMiner Pilot Check-Ins interface. It features a central workspace with two main sections: 'What's Going Well?' (top, light green background) and 'What Could Be Better?' (bottom, light pink background). To the left, there are several 'Current Check-Ins' represented by colored cards (purple, green, blue, red, orange, grey). To the right, there are two 'Previous Check-Ins' panels, each displaying a grid of sticky notes with text and icons. The top left corner shows the 'AUDITMINER' logo.

19



19

Live Example

- ▶ Group Size
- ▶ Alone / Together
- ▶ Phased Input
- ▶ Report out order
- ▶ Neutral Facilitator

20



20

NOW WHAT



21

Evaluation Criteria

- ▶ Synthesize Feedback
 - Look for Themes
- ▶ Moving forward
 - Start thinking about adoption
 - Look for other features
- ▶ Not moving forward
 - Capture lessons learned
- ▶ Do a retrospective either way



22

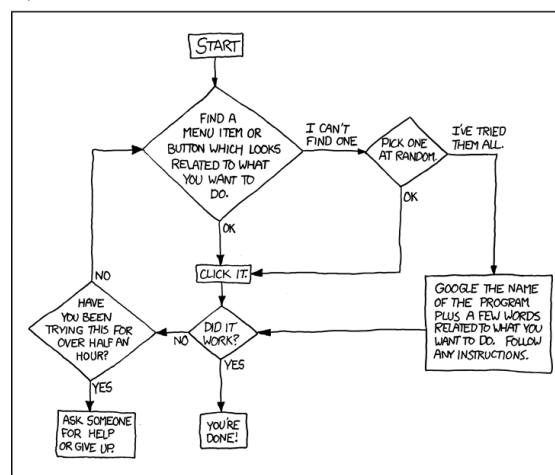


22

PATB

DEAR VARIOUS PARENTS, GRANDPARENTS, CO-WORKERS,
AND OTHER "NOT COMPUTER PEOPLE:"

WE DON'T MAGICALLY KNOW HOW TO DO EVERYTHING IN EVERY
PROGRAM. WHEN WE HELP YOU, WE'RE USUALLY JUST DOING THIS:



PLEASE PRINT THIS FLOWCHART OUT AND TAPE IT NEAR YOUR SCREEN.
CONGRATULATIONS; YOU'RE NOW THE LOCAL COMPUTER EXPERT!

<https://xkcd.com/627/>

23



23

Additional Considerations

- ▶ Insight into the vendor's plans and roadmap are key
- ▶ A pilot doesn't necessarily conclude with "yes" or "no" on moving forward
- ▶ Get IT involved early on
- ▶ Executive Awareness
- ▶ Having an implementation plan is crucial
- ▶ Thank your participants – make them famous!

24



24

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25