

Pilot Planning Checklist

The timeline and plans are set.

- We have set deadlines and responsibilities for all the preparatory work
- We have deadlines for starting and stopping the pilot study
- The plans include how to respond to unanticipated problems
- The plans account for constraints (budget, resources, time) placed on the pilot study
- We have scheduled a debriefing session and everyone knows how to prepare for that session

We have defined the new procedures to be tested.

- New procedures are documented with visual aids as well as written instructions
- All other needed materials, instructions, etc., are prepared

All stakeholders have been prepared.

- Everyone involved in the pilot test understands his/her role
- We have reviewed the new documentation and explained the new procedures to those involved with the pilot study
- Anyone affected by the change has been informed of when the test will start and stop and what it involves

We know how we will measure success or failure.

- We are prepared to monitor both methods and results
- We have a data collection plan in place that will allow us to monitor key indicators
- WE have methods/tools for documenting what works, what doesn't, and who we respond to with unanticipated problems