Pilot/Experiment Document Outline

This process applies the principles and "best practices" of IT project management to a experiment process for alternative business solutions and new technologies. Its purpose is to assess whether the solution or technology could solve a business problem identified.

The process can be used for any solution integrated into an existing business or technology operations. It ensures that the decision to invest in a specific solution is made from an informed position.

What are we doing, and why are we doing it?

1 Introduction

   a. Background (Current state, problem, environment and how we got here)
   b. Purpose (Why is this initiative important)
   c. Scope of Initiative (What's in and out of scope for this initiative)

2 What is our hypothesis

"[Our company] has identified on obstacle/opportunity that needs to be addressed in order to meet our goals and objectives. By bringing xx resources to bear and/or investing in xx solution, we believe that we will achieve the following qualitative and/or quantitative benefits"

3 Goals & Key Objectives for the experiment

   a. Define the goals for this initiative
   b. For each of the goals, define the objectives required to achieve them

4 What constraints may impact the ability to run the this piece of work?

   a. Define the relevant resource, environmental, operational, and/or political constraints under which the initiative must operate. PESTLE is a handy model to use here.
   b. What will we stop doing, in order to apply resource to this initiative.

5 What do we need to consisder

   a. The proposed options or alternatives to be evaluated and/or;
   b. The product(s), concept(s), processes, or system(s) to be evaluated
   c. The evaluation approach for proposed options or alternatives to be evaluated and/or;
   d. The evaluation approach for the Product(s), concept(s), processes, or system(s) to be evaluated
   e. Any comparative analysis to be conducted for the proposed options or alternatives
   f. The environment, location(s), and general composition of the evaluation team(s)

6 How long will the experiment run for (i.e., components, phases, and overall)

The experiment must be time bound

7 What do we need to show to know we are successful

This experiment must have pre-agreed success criteria

How will we run it

8   Evaluation Design

a. What will be evaluated specifically
b. How and where will products/concepts/alternatives/systems/processes and their specific components be configured, tested, monitored, evaluated, and documented
c. Where and when will specific components be tested (Locations, environments, sequencing and their associated interdependencies)
d. How comparative analysis will be conducted and evaluated for the proposed products(s), concept(s), Systems(s), concept(s), processes, options, or alternatives
e. Identify known and potential impacts to business and/or technical operations and define corresponding criticalities and mitigation strategies
f. What Resources Required (i.e., facilities, equipment, people, etc)
g. Team composition (e.g., SMEs, skill sets, etc) for each phase and their respective roles and responsibilities
h. Outline Expected Outcomes and Criteria for success
i. Establish Evaluation Matrix and Worksheets
j. Governance and Decision Authority and Approvals

9   What do we need to do at the end of the experiment

When the experiment ends, what do we need to do to unwind it?

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Key Decisions to be made at the conclusion of the initiative

10   Did the experiment support the hypothesis?

Yes/No

11   Lessons Learned

a. feedback and
b. discussion on topics
c. considerations
d. valuable information that are above and beyond the scope of this initiative

12   Evaluation Findings & Conclusions (Summary)

13   Recommendations & Final Decisions

14   Appendix (Supporting Documentation, Evaluation/Test Results, etc)