

piloting for impact: turning cx ideas into statewide solutions

Gaby Dorantes & Kristen Uroda, Civilla

who we are

**we're civilla—a non-profit
design studio based in
detroit, michigan.**

**we use human-centered
design to reimagine how
public institutions work.**



small team, big dreams



USER NEED

INSTITUTIONAL
PLANNING

agenda



What is a pilot?

Creating Readiness

Implementation

Recap

Q&A

**what is a
pilot?**

the hcd process

Discovery research

Understand the journey through user research and best practices

Design and test

Design solutions that meet user needs and improve them based on feedback

Pilot

Test solutions and measure outcomes to demonstrate impact

Implementation

Create readiness in the organization and deliver change at scale

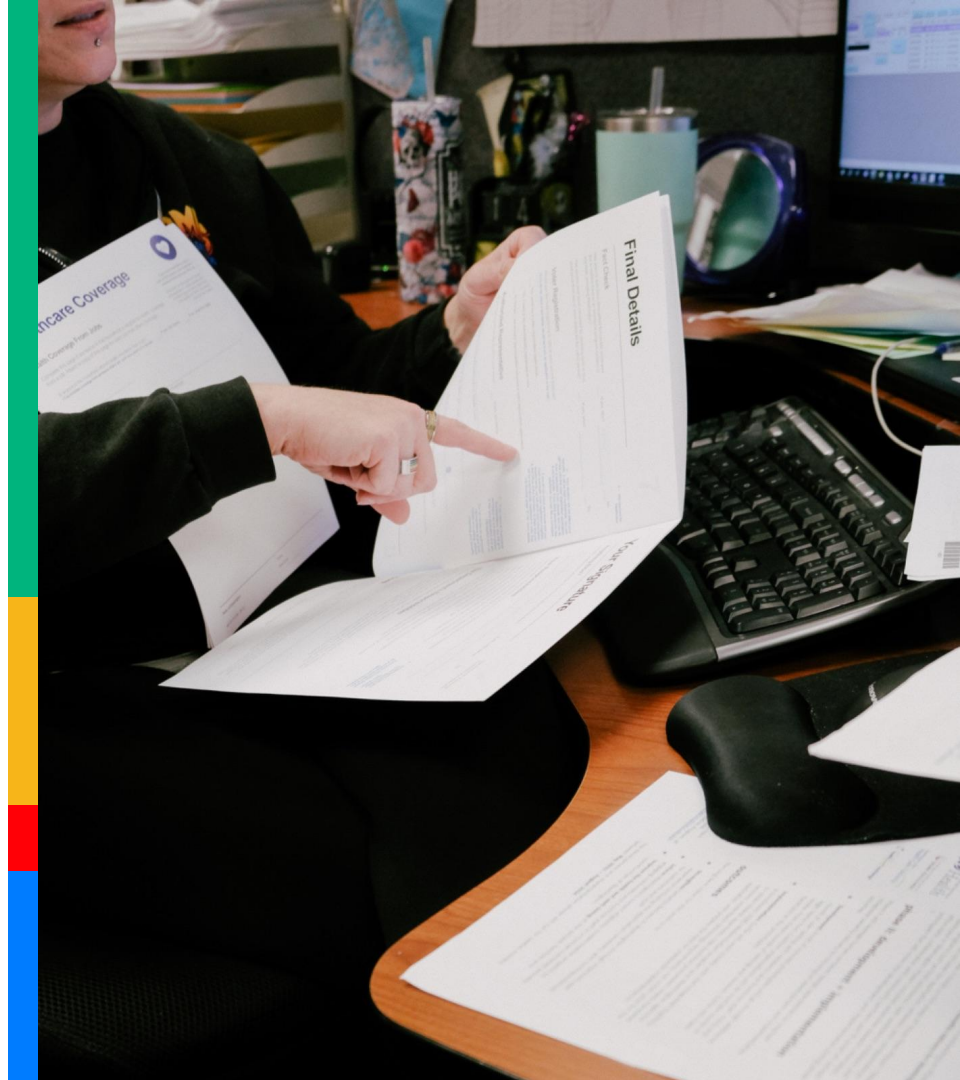
what people think pilots are

- A safe way to experiment without commitment
- Testing out ideas to “see what happens”
- Focusing only on quantitative data
- Only user research



the real value of pilots

- Pilots are where you start culture change
- You will identify your first internal champions
- It is the seed for successful implementation



case studies

michigan pilot prep

- **1,700 pages** of policy
- **6 months** of policy + legal reviews
- **5 policy teams** working together for the first time
- **Requirements met**
federal, state,
departmental



washington pilot

- **2 week pilot** in 2024
- Piloted a paper **integrated benefits application**
- **Requirements met** federal, state, departmental



recipe for success

- **Check** your readiness
- **Align** on “north star” goal
- **Design** the pilot experience
- **Train** those who will help operationalize your pilot



pilots take time + effort

Planning a pilot **can take anywhere from 3-6 months.**

**creating
readiness**

project leadership + operations

Planning a pilot must be a **top priority** for your organization.

Otherwise, the pilot risks being de-prioritized by inertia, competing agendas, and inevitable roadblocks.

- ✓ Train team members
- ✓ Identified a team committed to seeing the pilot through from start to finish who will prioritize the voice of end users
- ✓ Leadership is ready to navigate culture change at every level and can challenge existing processes
- ✓ Channels to communicate the why, what, when, where, and how behind the pilot with all internal stakeholders.
- ✓ Time and resources to develop goals, metrics, a business process, and training and then synthesize findings

paths forward

Pilot Ready

- Thoroughly tested solution
- Org meets the operational and leadership conditions

Pilot Cautious

- It will be a stretch to meet checklist conditions now or in the future
 - Inadequate testing of your solution
 - Targeting a small demographic
- Do more user testing instead

**aligning on
goals**

1 find your north star

A "North Star" goal is a clear and compelling vision that will help guide all aspects of the pilot. It serves as the central reference point your stakeholders and teams will continually return to for alignment and inspiration.

why do we need a north star goal?

A North Star goal is crucial for several reasons:

- **Alignment**
- **Focus**
- **Motivation**
- **Consistency**



crafting your north star

Your North Star goal should be:

- **Clear:** Easily understood by all stakeholders.
- **Compelling:** Motivates and inspires action.
- **Connected:** Relates back to your project goal.
- **Simple:** Summarized within 1-2 sentences.



guiding questions

- If we could only understand **one** thing from this pilot, what would it be?
- What questions can this pilot answer? What questions can't it answer?
- What “north star” language can we align on for strong, clear, consistent, communication?



don't boil the ocean

There will be many wonderful ideas and opinions on what the goal should be, and there may be a number of things you're eager to discover in the pilot, but where there is flaring, there must be focus. **Resist “boiling the ocean”**—the more defined and articulate you can be, the greater impact your pilot will have.

Streamlining the process for benefits applications to make one day determinations possible.

Increase the number of new participants enrolled in state-provided programs.

Transforming benefits delivery by creating an integrated and more human-centered process for both residents and frontline staff.

Enhance access to affordable housing.

Build new ways to streamline access to energy assistance, moving towards greater stability with dignity.

Increase awareness of benefits programs by next year.

Can you identify the north star goals? *(hint: there are 3)*

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tips for writing

step

1

Start at the end

step

2

Write down your core objective

step

3

Keep humans at the center

step

4

Tie it back to your project goal

case study

**designing
the pilot
experience**

3 designing the pilot experience

This is where you'll really get into the weeds and start selecting staff and sites to host and operationalize your pilot, creating detailed plans for any new business processes, and ensuring that all elements are in place for a smooth launch.

three critical components

→ Who?

Who do you need to train and onboard to help operationalize your pilot?

→ Where?

Where will the pilot take place and what conditions are needed there to make your pilot a success?

→ How?

What will the business process look like and who will help you build it?
What will you need to modify for your pilot?

the who + where

When narrowing down your options for staff and sites, consider the following:

- **Diversity + Representation:** Choose diverse sites so the pilot captures a wide range of experiences and challenges
- **Capacity + Capability:** Select sites and staff with the capacity and capability to fully participate.
- **Engagement + Ownership:** Involve committed and experienced staff.



WA pilot sites

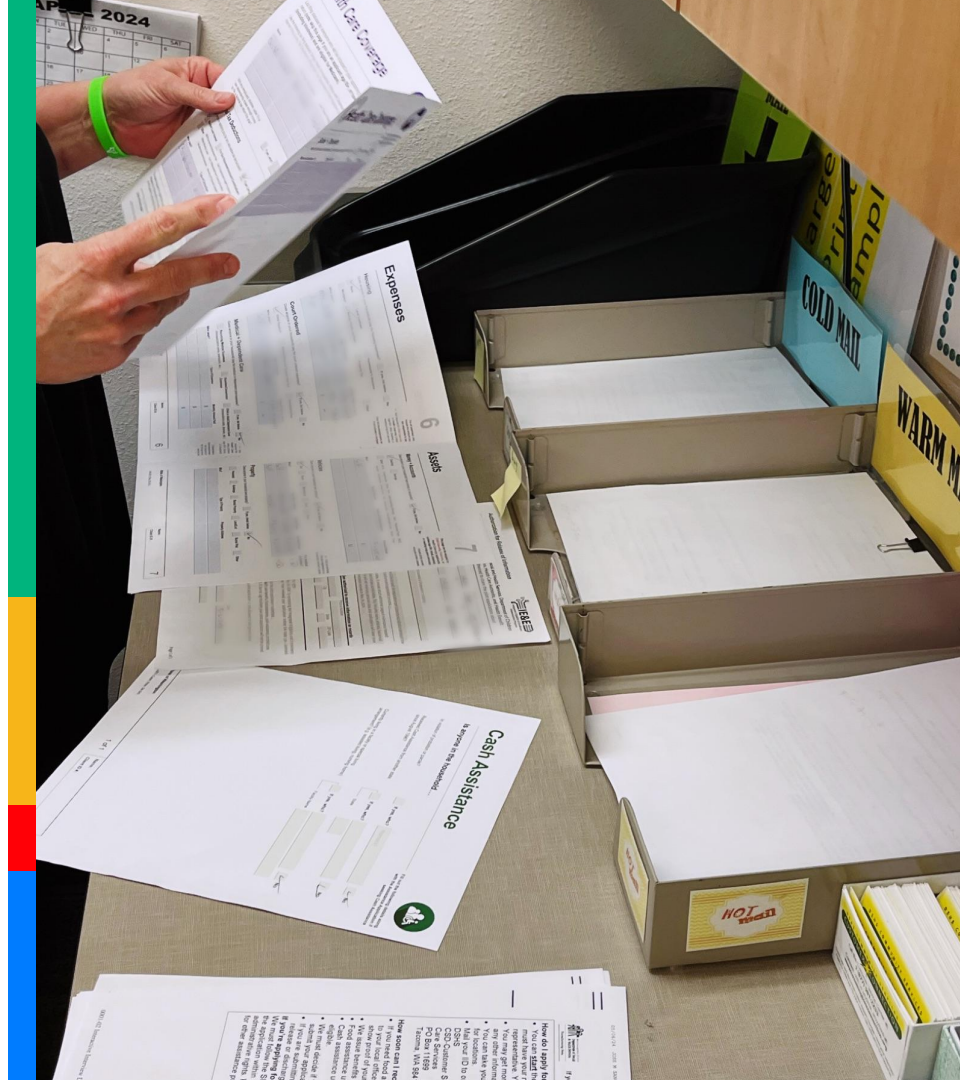
- **King South**
 - Large office in urban western WA
- **Moses Lake**
 - Medium office in rural eastern WA
- **Better Health Together**
 - Non-profit community healthcare organization in Spokane



the how

We recommend building the business process first with the end users for several reasons:

- **Expertise + Insight:** End users are the experts and possess valuable insights into what works well and what doesn't.
- **Practicality + Feasibility:** Involving end users ensures that the business process is practical and feasible.
- **Buy-In + Ownership:** When end users are involved in developing the business process, they are more likely to feel a sense of ownership and buy-in.



end user insights

As you begin designing the pilot experience,
**how can you ensure that the insights and
expertise of end users are involved in designing
the process?**

**ready, set,
train!**

4 training + support

Before your pilot launches, you'll need to familiarize selected staff with the pilot's objectives, tools, and processes, and provide hands-on practice and support. Training should be comprehensive, immersive, and timely to set the stage for a smooth and effective pilot launch.

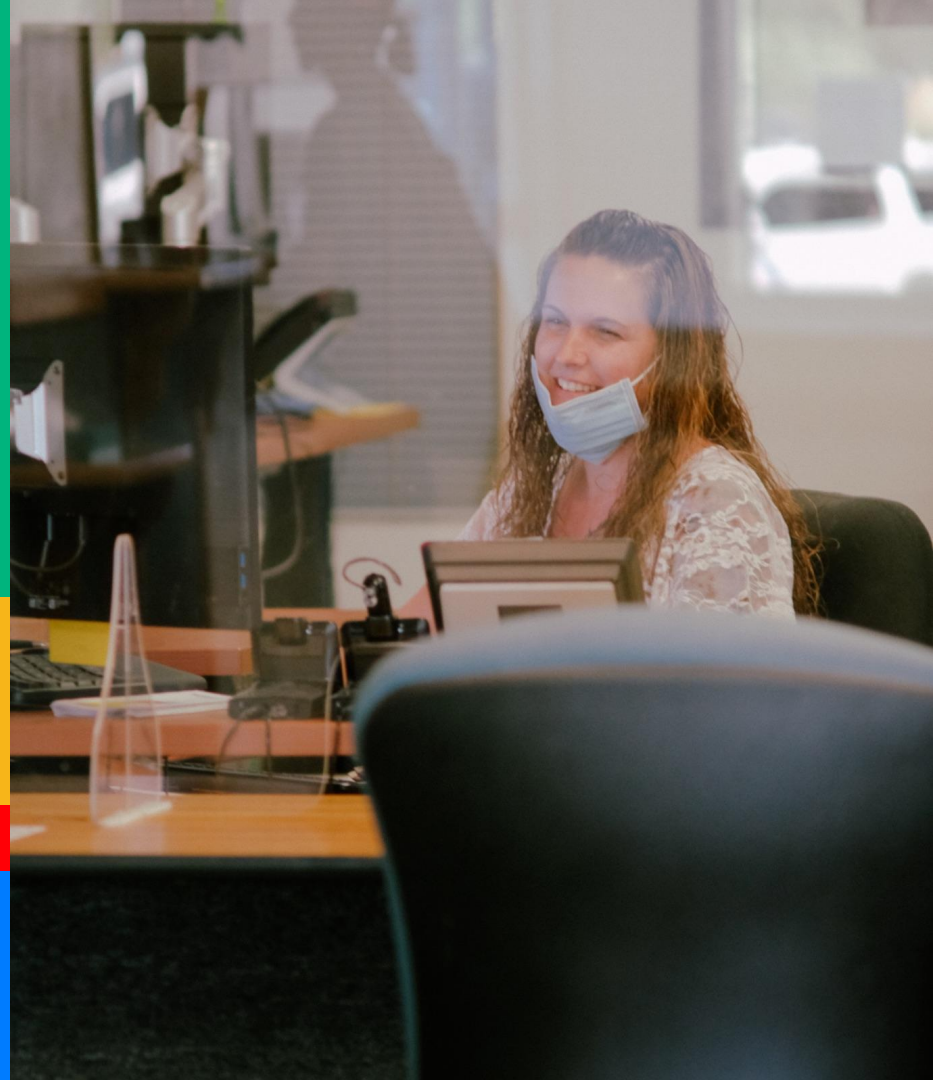
training best practices

the what	the why
1 Design training sessions that are interactive and hands-on.	Helps staff better understand and retain new information.
2 Break down the training into modules that cover different aspects of the pilot.	Makes it easier to absorb and retain information and allows for flexibility in training.
3 Develop support materials and a system for continuous feedback.	Enables you to address issues or questions promptly, enhancing staff confidence and competence.
4 Involve experienced staff or subject matter experts in delivering the training.	Experienced trainers offer valuable perspectives and enhance the credibility and relevance of the content.

be intentional

When trainings are not designed with intention, several issues can arise:

- **Increased errors** can lead to inefficiencies and potential harm to users.
- **Low confidence** for learners
- **Inconsistency** can affect the reliability and validity of the pilot's findings.
- **Reduced engagement**, leading to less committed staff how may dismiss your solution.



your training experiences

- What was memorable?
- What was painful?
- Did it embody any HCD principles?
- How can we think about **training as an experience** and not an afterthought?

**thinking about
implementation**

uncertainty

No amount of piloting can eliminate all uncertainties.

The goal is to gather enough evidence that the solution is effective and viable and keep iterating after rollout.

when are you ready for implementation?

The pilot consistently **produces positive results** across different sites and groups, any significant issues identified in the pilot have been **resolved**, key stakeholders are **supportive and engaged**, and the data collected from the pilot provides an understanding of the solution's **effectiveness, benefits, and potential challenges**.

potential risks

Prolonged or excessive piloting can lead to:

1. **Stagnation:** Endless piloting can halt progress and momentum.
2. **Wasted Resources:** Time, money, and personnel could be better used in implementation.
3. **Reduced Credibility:** Extending the pilot phase can make your words and plans appear less credible.
4. **Missed Opportunities:** Delaying implementation means missing out on the potential improvements and efficiencies that the solution can bring.
5. **Loss of Trust:** Running without an end goal in sight can erode trust.



in conclusion...

Be sure to...

Keep your North Star Goal clear, compelling, connected, and simple.

Beware of...

Trying to do too much in a single pilot.

Be sure to...

Select metrics that are aligned, valuable, and collectable.

Beware of...

Choosing metrics that distract from your North Star.

Be sure to...

Involve end users from the start in designing the business process.

Beware of...

Dismissing the wealth of expertise that is available to you.

Be sure to...

Design training that is interactive, dynamic, timely, and peer-to-peer.

Beware of...

Overlooking the training experience and launching it at the last minute.

Be sure to...

Use pilots to gain confidence in your solution before rollout.

Beware of...

Eroding the trust of your end users by delaying implementation.

q&a



website

civilla.org

**practica learning
program**

civilla.org/practica

civilla