



Planning your technology pilot

Before you release your innovative technology to the world, you need to pilot it. What you learn from the pilot not only helps you improve your technology, but it can also help you get to know your ideal customer and understand what outcomes they see from using your product. This kind of early user data can be incredibly valuable to your business.

If these initial customers have a good experience with your product, they can also be your champions. Because they have had a hand in helping you develop your tech, they could feel passionate about it and could help you market it to their network.

All of these things underline not only the importance of conducting a pilot, but also the need to properly plan your pilot so that you get the data you need and your users have a positive experience.

Here are four steps to start planning your technology pilot.

Four steps to get started

- 1. Write a list of questions you need the pilot to answer.** A pilot is essentially research, and every research project starts with research questions. What questions are you hoping to answer with this pilot? Is it simply about usability (i.e. does the tech work?), or are you hoping to see some outcomes that impact your user? Are you trying to understand who your ideal user is? Any of these questions would be relevant for your pilot, and they will determine what kind of data you need to collect to answer them.
- 2. Determine the timing and schedule for the pilot.** You may have a release date for your software that is driving your schedule for the pilot. But you also need to take into account the right timing for your users. Is this a busy time of year for them to participate in a pilot?



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You also need to consider how much time the users need to work with your product. If you are measuring user outcomes, what duration and frequency do users need to spend with your product in order to start seeing these outcomes? (Most start-ups do not know the answer to this question, which means they essentially don't know whether their product even works!)

- 3. Select a sample of users to participate in the pilot.** Ideally, your sample will be a group of users who are the same demographics as your target audience. This will give you a better understanding of how future customers will experience the product. Once you have found this group, you might need to offer an incentive (such as a product discount or special status) to encourage them to actively participate. Remember, you want these users to become loyal customers and champion your product to their networks, so it's worth the investment to make sure they have a good experience. Take into account some user attrition when planning the size of your sample; even the best-intentioned people run into competing priorities and may not be able to participate to the level you were hoping.

It's also worth taking some time to think about the skills and technical abilities of your sample. How do you need to prepare them so that they are able to use your product with ease, and have a good experience? Consider their technical setup as well. Do they have the right equipment to use your product?

- 4. Collect your data.** Find a way to collect data from these early users and track these data in a way that allows analysis now and in the future. When putting together your first pitch deck or marketing materials, you could draw anecdotal data or even some early customer satisfaction statistics from this group. There are many ways to collect data, but you might consider the following:

- **Interviews** can be time consuming but can provide customer testimonials or quotes. Interviews can also explain the "why" of a phenomenon.



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- **Surveys** allow you to cover a larger sample of users and use the data to create statistics and correlations.
- **Observations** can help you understand how users are using your product, what their journey is, and where/why they are running into difficulty
- **Journals** kept by users can offer detailed user data over time. Asking a user to spend 5 minutes writing about their experience with your product each day can give you a deeper understanding of how it is being used in their life or work.
- **Product data** is whatever data are collected by your platform or product. Think about the questions you can ask of these data – and whether you have user permission to do so!

Final thoughts

Piloting your tech can provide more benefits to you and your company than just telling you whether your technology works. But you have to plan for this to happen. This How-To guide gives you the foundation for planning to ensure that you get the most out of your technology pilot.

For more information

For more information on data collection, see our other Learning resources for each of the data collection methods mentioned above.

For more information on using research and evidence in your business, stay tuned for our Masterclass on this topic.