

P U L S E F O R G O O D

Rapid Feedback

Pilot Toolkit

A complete 30-day launch kit for testing anonymous participant feedback at a single site before scaling organization-wide. This toolkit contains 10 ready-to-use documents covering pilot planning, survey design, success metrics, staff training, communication templates, data review cadences, go/no-go decisions, debrief facilitation, and scale-up readiness — everything you need to run a fast, focused, evidence-based pilot.

10 Pilot Launch Documents

Worksheets • Templates • Checklists • Decision Frameworks

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Toolkit Contents

This toolkit guides you through a focused 30-day pilot of anonymous participant feedback at a single site. Each document covers one dimension of pilot planning, execution, evaluation, and scale-up decision-making.

Document 1: 30-Day Pilot Planning Worksheet — Day-by-day timeline with milestones and owners

Document 2: Minimum Viable Survey Templates — Lean survey designs for rapid pilot deployment

Document 3: Pilot Success Metrics Checklist — What to measure and what “success” looks like

Document 4: Participant Recruitment Plan Template — Strategies for driving kiosk engagement during pilot

Document 5: Staff Training Micro-Guide — 10-minute pilot-specific training for frontline staff

Document 6: Pilot Communication Templates — Announcement and update emails for the pilot period

Document 7: Data Review Cadence Planner — When and how to review incoming data during the pilot

Document 8: Go / No-Go Decision Framework — Structured criteria for deciding whether to scale

Document 9: Pilot Debrief Facilitation Guide — Running the end-of-pilot retrospective meeting

Document 10: Scale-Up Readiness Checklist — What must be true before expanding to additional sites

DOCUMENT 1

30-Day Pilot Planning Worksheet

A day-by-day timeline with milestones, owners, and go-live readiness checkpoints

 **INSTRUCTIONS:** Complete this worksheet before the pilot begins. The 30-day window is divided into 3 phases: Setup (Days 1–10), Live Collection (Days 11–25), and Evaluation (Days 26–30). Every milestone has an owner and a completion date. Don't start Phase 2 until all Phase 1 items are checked.

Pilot Overview

| FIELD | YOUR DETAILS |
|---------------------------|--|
| Organization | |
| Pilot site | |
| Pilot start date | |
| Pilot end date | (30 days from start) |
| Pilot sponsor (executive) | |
| Pilot lead (day-to-day) | |
| Target responses | [Minimum 50 recommended for meaningful data] |
| Kiosk location(s) | |
| Survey length | [Target: 5–8 questions, <2 minutes] |

Phase 1: Setup (Days 1-10)

| DAY | MILESTONE | OWNER | STATUS |
|-----|---|-------|--------|
| 1-2 | Survey finalized and loaded on kiosk platform | | |
| 1-2 | Pilot site selected; kiosk placement confirmed | | |
| 3-4 | Staff training completed (use Document 5) | | |
| 3-4 | Signage designed and printed for kiosk area | | |
| 5 | Leadership announcement sent to pilot site staff (use Document 6) | | |
| 5-7 | Kiosk hardware set up, tested, and confirmed working | | |

| | | | |
|------|---|--|--|
| 7-8 | Participant-facing signage installed near kiosk | | |
| 8-10 | Dry run: 3-5 staff complete the survey as test participants | | |
| 10 | Go-live readiness checklist completed (all items below checked) | | |

Go-Live Readiness Checklist

| | |
|--------------------------|--|
| <input type="checkbox"/> | Survey is finalized, tested, and loaded on the kiosk |
| <input type="checkbox"/> | Kiosk is installed in an accessible, semi-private, high-traffic location |
| <input type="checkbox"/> | Kiosk has power, is connected (if needed), and is confirmed functional |
| <input type="checkbox"/> | Signage explains anonymity and purpose in plain language |
| <input type="checkbox"/> | All pilot-site staff have completed the 10-minute micro-training (Document 5) |
| <input type="checkbox"/> | Leadership has sent the announcement email (Document 6, Email A) |
| <input type="checkbox"/> | Data review cadence is set (Document 7) and calendar invites are sent |
| <input type="checkbox"/> | Pilot success metrics are defined and baseline data is documented (Document 3) |
| <input type="checkbox"/> | Pilot lead has a troubleshooting contact for technical issues |
| <input type="checkbox"/> | A designated person will check the kiosk daily for functionality |

Phase 2: Live Collection (Days 11-25)

| DAY | MILESTONE | OWNER | STATUS |
|-------|---|-------|--------|
| 11 | Kiosk goes live. Day 1 of data collection. | | |
| 11-12 | Pilot lead checks response volume daily; troubleshoot if zero. | | |
| 14 | Week 1 data review (Document 7). Share quick snapshot with leadership. | | |
| 15 | Mid-pilot staff check-in: any concerns? Questions? Observations? | | |
| 18 | Participant engagement check: are responses coming from diverse participants? | | |
| 21 | Week 2 data review. Identify early themes. | | |
| 25 | Final day of data collection. Download complete dataset. | | |

Phase 3: Evaluation (Days 26-30)

| DAY | MILESTONE | OWNER | STATUS |
|-------|---|-------|--------|
| 26-27 | Complete data analysis: scores, themes, open-ended review | | |
| 27-28 | Complete pilot success metrics assessment (Document 3) | | |
| 28-29 | Conduct pilot debrief with staff (Document 9) | | |
| 29-30 | Complete Go / No-Go Decision Framework (Document 8) | | |
| 30 | Deliver pilot summary to leadership with recommendation | | |

DOCUMENT 2

Minimum Viable Survey Templates

Lean, tested survey designs for rapid pilot deployment — get meaningful data with minimal questions

INSTRUCTIONS: A pilot survey should be short enough to complete in under 2 minutes but comprehensive enough to produce actionable data. These templates have been tested across hundreds of organizations serving vulnerable populations. Choose the template that best fits your service type and customize the bracketed fields.

Core Principle

The Pilot Survey Is Not the Final Survey

Resist the urge to ask everything. The pilot is a test of the SYSTEM (kiosk, anonymity, staff response, data flow) not a comprehensive assessment of every service dimension. You can expand the survey after the pilot proves the system works. For now, keep it lean.

Template A: 5-Question Universal (Recommended for Most Pilots)

| # | QUESTION | RESPONSE TYPE | PURPOSE |
|---|---|----------------------------------|----------------------------------|
| 1 | Overall, how was your experience at [Organization] today? | ☹️ 😞 😊 😄 😊 (5-point emoji scale) | Overall satisfaction baseline |
| 2 | Did staff treat you with respect? | 👎 👍 (Thumbs down / Thumbs up) | Staff interaction quality |
| 3 | Did you feel safe here today? | 👎 👍 (Thumbs down / Thumbs up) | Safety baseline |
| 4 | What did we do well? | Open text (optional) | Positive theme identification |
| 5 | What could we do better? | Open text (optional) | Improvement theme identification |

Template B: 8-Question Expanded

Use when you need slightly more granularity, such as for funders who expect domain-specific data:

| # | QUESTION | RESPONSE TYPE |
|---|---|---------------------|
| 1 | Overall, how was your experience today? | 5-point emoji scale |
| 2 | Did staff treat you with respect? | Thumbs up / down |
| 3 | Did you feel safe here? | Thumbs up / down |
| 4 | How would you rate the cleanliness of this location? | 5-point emoji scale |
| 5 | Were you able to get the help you needed today? | Thumbs up / down |
| 6 | Is there anything that made your experience difficult? | Open text |
| 7 | What would you like us to know? | Open text |
| 8 | Would you recommend [Organization] to someone in a similar situation? | Thumbs up / down |

Template C: 3-Question Ultra-Lean

Use when you're testing the system itself more than collecting comprehensive data — ideal for very short service interactions or extremely low-literacy populations:

| # | QUESTION | RESPONSE TYPE |
|---|------------------------------------|---|
| 1 | How was your experience today? | ☹️ 😐 😊 (3-point emoji scale: bad / okay / good) |
| 2 | Did staff treat you well? | 👎 👍 (Thumbs) |
| 3 | Anything else you want to tell us? | Open text |

Survey Design Rules for Pilots

| | |
|--------------------------|--|
| <input type="checkbox"/> | Maximum 8 questions (5 recommended for first pilot) |
| <input type="checkbox"/> | Completion time under 2 minutes (test with a timer) |
| <input type="checkbox"/> | At least 1 open-ended question (this is where the richest pilot data comes from) |
| <input type="checkbox"/> | Visual response scales (emoji, thumbs, stars) — no Likert text scales during pilot |
| <input type="checkbox"/> | Questions in plain language at a 5th-grade reading level or below |
| <input type="checkbox"/> | A clear “Thank you” screen at the end with a simple message about anonymity |
| <input type="checkbox"/> | No demographic questions during the pilot (add later if the system proves viable) |
| <input type="checkbox"/> | Every question has a “Skip” option — no forced responses |

DOCUMENT 3

Pilot Success Metrics Checklist

Defining what “success” looks like before the pilot starts — so the decision is evidence-based, not political

INSTRUCTIONS: Complete this BEFORE the pilot begins. Setting success criteria after seeing results introduces bias. These metrics define the minimum thresholds for the pilot to be considered successful. They feed directly into the Go/No-Go Decision Framework (Document 8).

Pilot Success Metrics

| METRIC | WHAT IT MEASURES | THRESHOLD FOR SUCCESS | ACTUAL RESULT | PASS? |
|---------------------------|--|--|---------------|-------|
| Total responses collected | System viability: are participants using it? | ≥50 responses in 15 days | | Y / N |
| Average responses per day | Sustained engagement, not a one-day spike | ≥3 responses/day for ≥10 of 15 collection days | | Y / N |
| Survey completion rate | Survey usability: are people finishing? | ≥70% (started vs. completed) | | Y / N |
| Average completion time | Survey length appropriateness | ≤2 minutes | | Y / N |
| Open-ended response rate | Willingness to share qualitative feedback | ≥30% of respondents provide at least 1 text response | | Y / N |
| Kiosk uptime | Technical reliability | Functional ≥90% of operating hours | | Y / N |
| Staff incidents | Staff compliance with protocols | Zero incidents of staff watching kiosk or asking what participants wrote | | Y / N |
| Safety/urgency flags | System detects critical issues | Any safety concern identified is escalated within 24 hours | | Y / N |
| Data quality | Responses are meaningful, not gibberish | <10% of responses are blank, test entries, or nonsensical | | Y / N |

Scoring Guide

| RESULT | OVERALL ASSESSMENT | RECOMMENDATION |
|------------------|-----------------------|---|
| 8-9 metrics pass | Strong pilot | → Proceed to scale (Document 10) |
| 6-7 metrics pass | Qualified success | → Address gaps, extend pilot 2 weeks, then re-evaluate |
| 4-5 metrics pass | Mixed results | → Significant redesign needed before scaling. Identify root causes. |
| 0-3 metrics pass | Pilot did not succeed | → Conduct debrief (Document 9). Redesign approach before retrying. |

Qualitative Success Indicators

In addition to the metrics above, note these qualitative observations:

| INDICATOR | OBSERVATION | POSITIVE / NEUTRAL / CONCERNING |
|---|-------------|---------------------------------|
| Participants approach the kiosk without prompting | | |
| Staff mention the kiosk positively or neutrally in conversation | | |
| Open-ended responses contain substantive, specific feedback | | |
| No participant complaints about privacy or anonymity | | |
| Leadership expresses interest in the data | | |
| At least one actionable insight emerged from pilot data | | |

DOCUMENT 4

Participant Recruitment Plan Template

Strategies for driving kiosk engagement during the pilot without compromising anonymity

 **INSTRUCTIONS:** *Participants won't magically use the kiosk just because it's there. This plan outlines ethical strategies for encouraging engagement during the pilot period. The goal is awareness and access — never pressure. Every strategy must preserve the voluntary, anonymous nature of the feedback system.*

Awareness Strategies

| STRATEGY | HOW TO IMPLEMENT | TIMING | OWNER |
|--------------------------------------|--|---------------|-------|
| Kiosk placement in high-traffic area | Place kiosk where participants naturally wait or pass (lobby, hallway near exit, dining area). Avoid secluded areas. | Before Day 11 | |
| Clear signage | Simple poster near kiosk: "Your voice matters. Share your anonymous feedback. Takes 2 minutes." Use visual icons, not just text. | Before Day 11 | |
| Multilingual signage | If >10% of participants speak another language, provide signage in that language. | Before Day 11 | |
| Verbal mention by staff | Staff mention the kiosk once during interactions: "There's an anonymous feedback kiosk in the lobby if you'd like to share your experience." | Days 11-25 | |
| Visual cue on kiosk screen | Kiosk's idle screen should be inviting: "Tap here to share your feedback — it's anonymous." | Before Day 11 | |

Engagement Boosters (Use If Response Volume Is Low)

| BOOSTER | HOW IT WORKS | ETHICAL CONSIDERATION |
|---------------------------------|---|---|
| Gentle reminder signage refresh | Change the poster design or message at the 1-week mark to refresh attention | Signage should inform, not pressure |
| Community meeting announcement | "Reminder: the anonymous feedback kiosk is available in [location]." Brief mention, no hard sell. | Don't single anyone out or create group pressure to participate |

| | | |
|--------------------|--|---|
| Peer encouragement | If a participant mentions the kiosk positively, ask if you can share that with others (not their feedback content) | Never share what anyone wrote — only that the kiosk exists |
| Kiosk relocation | If volume is low, try moving the kiosk to a higher-traffic spot | Maintain semi-privacy; don't place where staff watch |
| Extended hours | If the kiosk is only available during limited hours, extend to cover more service times | Ensures shift equity — evening/weekend participants can participate too |

⚠ Never Do These to Boost Participation

- ✘ Never offer incentives (food, rewards, priority access) for completing the survey — this corrupts data integrity
- ✘ Never require or pressure participants to use the kiosk as a condition of service
- ✘ Never have staff stand near the kiosk to “help” participants complete it
- ✘ Never ask participants to fill it out in front of you
- ✘ Never track who has or hasn't used the kiosk

Daily Volume Tracker

| DAY | DATE | RESPONSES | CUMULATIVE | NOTES |
|-----|------|-----------|------------|-------|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |

| | | | | |
|----|--|--|--|--|
| 14 | | | | |
| 15 | | | | |

DOCUMENT 5

Staff Training Micro-Guide for Pilots

A 10-minute, pilot-specific training for frontline staff — minimal burden, maximum clarity

 **INSTRUCTIONS:** *This is a compressed version of the full Staff Buy-In & Adoption Toolkit, designed specifically for the pilot period. Deliver this in person, in 10 minutes, to all staff at the pilot site. It covers only what they need to know right now. Full onboarding comes later if the pilot succeeds.*

10-Minute Training Script

| MIN | TOPIC | SCRIPT / TALKING POINTS |
|------------|----------------------|---|
| 0:00–1:00 | What’s happening | “We’re testing an anonymous feedback kiosk at this site for 30 days. Participants can share their experience through a short touchscreen survey. No names, no tracking.” |
| 1:00–3:00 | What it IS and ISN’T | “This IS a listening tool to understand participant experience. This IS NOT a performance evaluation tool. Feedback will never be used in performance reviews.” |
| 3:00–5:00 | Your role | “You don’t need to promote or manage the kiosk. If a participant asks, say: ‘It’s anonymous — feel free to use it.’ Don’t stand near it. Don’t watch. Don’t ask what anyone wrote.” |
| 5:00–7:00 | What you’ll see | “At the end of the pilot, we’ll share aggregate results with you. You’ll see what participants said overall — never what any one person said.” |
| 7:00–9:00 | Questions | “What questions do you have?” [Use objection responses below if needed.] |
| 9:00–10:00 | Close | “Thank you. This is a 30-day test. Your feedback on the PROCESS matters too — tell [pilot lead name] if you notice anything.” |

Quick Objection Responses

| IF THEY SAY... | YOU SAY... |
|---------------------------------------|--|
| “Is this about evaluating us?” | “No. This will never be used in performance reviews. It’s about understanding participant experience.” |
| “What if someone complains about me?” | “We look at trends, not individual comments. One response doesn’t become an action against you.” |

| | |
|---------------------|---|
| “More work for us?” | “Your role is literally: don’t discourage it, and if asked, say it’s anonymous. That’s it.” |
| “Why a pilot?” | “We want to test it at one site first and learn before expanding. Your experience matters too.” |

Training Completion Tracker

| STAFF NAME | ROLE | TRAINING DATE | TRAINER | QUESTIONS / CONCERNS RAISED |
|------------|------|---------------|---------|-----------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
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DOCUMENT 6

Pilot Communication Templates

Announcement, update, and wrap-up emails for the 30-day pilot period

 **INSTRUCTIONS:** Send Email A before the pilot starts, Email B at the midpoint, and Email C after the pilot ends. Send from the pilot sponsor (most senior leader willing to sign). Customize bracketed fields.

Email A: Pilot Launch Announcement

 **Subject: We're Testing Anonymous Feedback at [Site] — Starting [Date]**

Hi team,

Starting [date], we're running a 30-day pilot of an anonymous feedback kiosk at [site]. This is a test. We want to learn whether this tool helps us hear from the people we serve.

What to know:

- The kiosk is in [location]. Participants take a short anonymous survey (~2 minutes).
- This is NOT a staff evaluation tool. Data will never be used in performance reviews.
- Your role: if asked, say "It's anonymous — feel free to use it." That's it.

We'll share what we learn with you at the end of the pilot. Questions? Reach [pilot lead name].

— [Sponsor Name, Title]

Email B: Midpoint Update (Day 15)

 **Subject: Feedback Pilot Update — Halfway There**

Hi team,

Quick update on the feedback pilot: we're two weeks in and have collected [N] responses so far.

A few early observations:

- Most feedback is [positive/constructive/balanced].
- The most common theme so far is [theme].
- No issues with the kiosk or the process have been reported.

Thank you for supporting this test. If you've noticed anything — positive or concerning — please share it with [pilot lead]. Your observations about the process are just as valuable as the participant data.

— [Sponsor Name, Title]

Email C: Pilot Wrap-Up

 **Subject: Feedback Pilot Complete — Here's What We Learned**

Hi team,

The 30-day feedback pilot at [site] is complete. Here's a summary:

BY THE NUMBERS: • Total responses: [N] • Overall satisfaction: [X]% positive • Top strength: [domain] • Top area for growth: [domain]

WHAT WE'RE DOING WITH THIS: • [Action 1 based on pilot findings] • [Action 2 if applicable]

NEXT STEPS: Based on the pilot results, we've decided to [scale to additional sites / extend the pilot / make adjustments before expanding]. We'll share more details soon.

Thank you for being part of this. Your willingness to support something new made this possible.

— [Sponsor Name, Title]

Participant-Facing Communication

Post Near the Kiosk (Signage Text)

 YOUR VOICE MATTERS

This kiosk lets you share anonymous feedback about your experience here.

- It takes about 2 minutes.
- No name or login required.
- No one will know what you wrote.
- We use your feedback to improve our services.

Tap the screen to get started.

DOCUMENT 7

Data Review Cadence Planner

When and how to review incoming pilot data — frequent enough to catch issues, not so frequent that you over-react

 **INSTRUCTIONS:** During a 15-day collection window, you need a structured review rhythm. Too infrequent and you miss problems. Too frequent and you make decisions based on too-thin data. This planner sets the right cadence.

Review Schedule

| REVIEW | WHEN | WHO | WHAT TO LOOK AT | EXPECTED TIME |
|---------------|--|----------------------------------|---|---------------|
| Daily Glance | Every morning, Days 11–25 | Pilot lead | Response count only. Is the kiosk getting responses? Is it still working? | 2 minutes |
| Week 1 Review | Day 18 (end of first week of collection) | Pilot lead + data lead | Response volume, completion rate, any safety flags, initial open-ended scan | 30 minutes |
| Week 2 Review | Day 25 (end of collection) | Pilot lead + data lead + sponsor | Full dataset: scores, themes, volume trends, data quality, safety items | 60 minutes |

Daily Glance Checklist (2 Minutes)

| | |
|--------------------------|---|
| <input type="checkbox"/> | Kiosk is powered on and functional (check screen — or check remotely if available) |
| <input type="checkbox"/> | Responses received today: ____ (record in Daily Volume Tracker, Document 4) |
| <input type="checkbox"/> | Cumulative responses to date: ____ |
| <input type="checkbox"/> | Any safety or urgency flags in today's data? (If yes: escalate immediately per triage protocol) |
| <input type="checkbox"/> | Any technical issues to report? (If yes: contact support) |

Week 1 Review Template

| METRIC | RESULT | ON TRACK? |
|-----------------------------|--------|-----------------------|
| Total responses (Day 11–18) | | ≥4/day avg = On Track |
| Completion rate | | ≥70% = On Track |
| Open-ended response rate | | ≥30% = On Track |

| | | |
|------------------------|--|---------------------------------|
| Kiosk uptime | | Any downtime to report? |
| Safety / urgency flags | | Any items requiring escalation? |
| Data quality | | <10% blank/gibberish = On Track |

If 3+ metrics are off-track at the Week 1 Review, investigate root causes before continuing. Common issues: kiosk placement, staff discouragement, signage visibility, survey too long.

Week 2 Review Template (Full Dataset)

| ANALYSIS | FINDINGS |
|--|----------|
| Total responses collected | |
| Overall satisfaction score | |
| Top-rated domain | |
| Lowest-rated domain | |
| Top 3 themes from open-ended responses | |
| Any safety/urgency items identified and escalated? | |
| Response volume trend (increasing, stable, decreasing) | |
| Completion rate | |
| Average completion time | |
| Data quality assessment | |
| Initial actionable insight | |

DOCUMENT 8

Go / No-Go Decision Framework

Structured criteria for deciding whether to scale, adjust, or stop after the pilot

 **INSTRUCTIONS:** Complete this framework after the Week 2 review (Day 25–30). It synthesizes all pilot data into a single decision: **GO** (scale to additional sites), **CONDITIONAL GO** (scale with modifications), **EXTEND** (more time needed), or **NO-GO** (fundamental redesign required). The decision should be evidence-based, not political.

Decision Criteria

| CRITERION | THRESHOLD | RESULT | PASS? |
|--------------------------------------|---|---------------|-------|
| Quantitative metrics (Document 3) | ≥6 of 9 metrics pass | ___ of 9 | Y / N |
| Qualitative indicators (Document 3) | ≥4 of 6 positive or neutral | ___ of 6 | Y / N |
| Data quality | <10% blank/gibberish responses | ___% | Y / N |
| Staff compliance | Zero incidents of protocol violation | ___ incidents | Y / N |
| Technical reliability | Kiosk functional ≥90% of operating hours | ___% | Y / N |
| At least 1 actionable insight | Pilot data surfaced at least 1 finding worth acting on | Y / N | Y / N |
| Leadership support | Sponsor confirms continued support | Y / N | Y / N |
| No unresolved safety/ethics concerns | All safety flags were escalated and addressed appropriately | Y / N | Y / N |

Decision Matrix

| CRITERIA PASSED | DECISION | NEXT STEPS |
|-------------------|---|--|
| 7–8 criteria pass |  GO — Scale | Proceed to Scale-Up Readiness Checklist (Document 10). Begin planning expansion to next site(s). |
| 5–6 criteria pass |  CONDITIONAL GO | Identify which criteria failed. Develop specific fixes. Scale to 1 additional site with modifications. |

| | | |
|-------------------|----------|--|
| 3-4 criteria pass | ● EXTEND | Extend pilot 2-4 weeks at the same site. Address failures. Re-evaluate using this framework. |
| 0-2 criteria pass | ● NO-GO | Conduct full debrief (Document 9). Identify fundamental barriers. Redesign before retrying. |

Decision Documentation

| FIELD | YOUR CONTENT |
|--------------------------------|---|
| Decision date | |
| Decision | ● GO / ● CONDITIONAL / ● EXTEND / ● NO-GO |
| Rationale | [2-3 sentences explaining the decision based on evidence] |
| Conditions (if Conditional Go) | [Specific modifications required before scaling] |
| Timeline for next steps | [Dates for scale-up, extension, or redesign] |
| Decision made by | [Names and roles] |
| Communicated to staff on | [Date and method] |

Key Principle

The Pilot Protects the Organization

A NO-GO decision is not a failure. It is the pilot doing its job.

The purpose of a pilot is to learn before investing further. Discovering that the system needs adjustment at 1 site is exponentially cheaper and less disruptive than discovering it at 10 sites.

Celebrate learning, even if the decision is to pause and redesign.

DOCUMENT 9

Pilot Debrief Facilitation Guide

Running the end-of-pilot retrospective that captures learning for the organization

 **INSTRUCTIONS:** Conduct this debrief on Days 28–29 of the pilot, after data analysis is complete but BEFORE the Go/No-Go decision is finalized. Include the pilot lead, pilot sponsor, 2–3 frontline staff from the pilot site, and the data lead. Duration: 45–60 minutes. This is not a data presentation — it’s a facilitated reflection on the process, not just the results.

Debrief Setup

| FIELD | DETAILS |
|-------------|--|
| Date | |
| Facilitator | [Someone other than the pilot lead, if possible] |
| Attendees | |
| Duration | 45–60 minutes |
| Materials | Printed: pilot metrics (Doc 3), data summary (Doc 7), this guide |
| Room setup | Circle or U-shape preferred. No presentation screen needed. |

Facilitation Agenda

| TIME | SEGMENT | FACILITATOR GUIDE |
|-------------|------------------------|---|
| 0:00–2:00 | Welcome & Ground Rules | “This is a learning conversation, not a blame session. We’re here to improve the process, not to defend it. Every perspective is valuable.” |
| 2:00–10:00 | What Worked | “Let’s start with what went well. What surprised you positively about the pilot?” Go around the room. Note themes. Probe: “Why do you think that worked?” |
| 10:00–20:00 | What Didn’t Work | “What was harder than expected? What would you change?” Separate SYSTEM issues (kiosk, placement, survey) from PEOPLE issues (staff response, participant engagement). Note both. |
| 20:00–30:00 | Staff Experience | “For frontline staff specifically: how did it feel having the kiosk in your workspace? Did participants say anything to you about it? Were you comfortable with your role?” |
| 30:00–40:00 | Data Highlights | “Here’s a brief summary of what the data showed. [Share 3–5 key findings.] What resonates? What surprises you?” Allow staff to react and contextualize the data with their |

| | | |
|-------------|-----------------|---|
| | | on-the-ground experience. |
| 40:00–50:00 | Recommendations | “If we were to run this again or expand it, what 3 things should we change?” Force prioritization: top 3, not a wish list. |
| 50:00–60:00 | Close | “Thank you. Your input is shaping the decision about whether and how we expand. We’ll share the decision and rationale with you by [date].” |

Debrief Notes Template

| CATEGORY | KEY THEMES | SPECIFIC QUOTES / EXAMPLES |
|---------------------------|------------|----------------------------|
| What worked | | |
| What didn’t work (system) | | |
| What didn’t work (people) | | |
| Staff experience | | |
| Data reactions | | |
| Top 3 recommendations | | |

Post-Debrief Actions

| | |
|--------------------------|---|
| <input type="checkbox"/> | Debrief notes are compiled and distributed to all attendees within 48 hours |
| <input type="checkbox"/> | Debrief findings are incorporated into the Go/No-Go Decision Framework (Document 8) |
| <input type="checkbox"/> | Top 3 recommendations are documented with owners and timelines |
| <input type="checkbox"/> | Staff who participated are thanked personally for their candor |
| <input type="checkbox"/> | Debrief notes are filed as part of the permanent pilot record |

DOCUMENT 10

Scale-Up Readiness Checklist

What must be true before expanding anonymous feedback from pilot to additional sites

 **INSTRUCTIONS:** *This checklist is for organizations that received a GO or CONDITIONAL GO decision from Document 8. It ensures that the infrastructure, processes, and organizational readiness are in place before expanding. Scaling prematurely is the most common mistake after a successful pilot — this checklist prevents it.*

Prerequisite: Pilot Results

| | |
|--------------------------|---|
| <input type="checkbox"/> | Go/No-Go decision is documented as GO or CONDITIONAL GO (Document 8) |
| <input type="checkbox"/> | Pilot debrief is complete and recommendations are documented (Document 9) |
| <input type="checkbox"/> | All conditions from CONDITIONAL GO (if applicable) have been addressed |
| <input type="checkbox"/> | Pilot success metrics are archived for baseline comparison at new sites |

Technical Readiness

| | |
|--------------------------|--|
| <input type="checkbox"/> | Kiosk hardware is available (or ordered) for each new site |
| <input type="checkbox"/> | Survey has been updated based on pilot learnings (if changes were needed) |
| <input type="checkbox"/> | Technical support process is established for troubleshooting across multiple sites |
| <input type="checkbox"/> | Data infrastructure can handle increased volume (storage, dashboards, reporting) |
| <input type="checkbox"/> | Remote monitoring capability exists to check kiosk status without visiting each site |
| <input type="checkbox"/> | Internet/power requirements have been confirmed at each new site |

Organizational Readiness

| | |
|--------------------------|---|
| <input type="checkbox"/> | Executive sponsor has reaffirmed commitment to the feedback system |
| <input type="checkbox"/> | Budget for ongoing operations is secured (hardware, software, staff time) |
| <input type="checkbox"/> | A dedicated feedback system owner is identified (role, not just a volunteer) |
| <input type="checkbox"/> | The full Staff Buy-In & Adoption Toolkit is ready for deployment at new sites |
| <input type="checkbox"/> | Objection-handling training is prepared for managers at new sites |
| <input type="checkbox"/> | The policy prohibiting punitive use of feedback data is formalized and communicated |
| <input type="checkbox"/> | Union / labor considerations (if applicable) have been addressed |

Process Readiness

| | |
|--------------------------|---|
| <input type="checkbox"/> | Data review cadence is established for multi-site operations (who reviews, when, what) |
| <input type="checkbox"/> | Prioritization process (Feedback Prioritization Toolkit) is ready to handle increased data volume |
| <input type="checkbox"/> | Equity analysis plan is in place for disaggregated data across sites |
| <input type="checkbox"/> | Escalation protocols for safety/urgency flags are documented and communicated |
| <input type="checkbox"/> | Feedback-to-funder reporting process is ready (Feedback-to-Funders Toolkit) |
| <input type="checkbox"/> | Participant-facing communication templates are ready for new sites (“What We Heard” posters, signage) |
| <input type="checkbox"/> | Success story documentation process is established (Staff Toolkit, Document 9) |

People Readiness

| | |
|--------------------------|--|
| <input type="checkbox"/> | Staff at new sites have been notified about the upcoming rollout |
| <input type="checkbox"/> | Full staff onboarding sessions are scheduled at each new site (Staff Toolkit, Document 7) |
| <input type="checkbox"/> | Site-level champions have been identified at each location (a staff member who can answer questions) |
| <input type="checkbox"/> | The pilot lead’s lessons learned have been incorporated into new-site onboarding |
| <input type="checkbox"/> | Leadership at new sites has received the Role-Specific Messaging Guide (Staff Toolkit, Document 6) |

Scale-Up Timeline

| PHASE | TIMELINE | ACTIVITIES | OWNER |
|------------------------|-----------|--|-------|
| Pre-launch preparation | Weeks 1-2 | Hardware setup, staff training, signage, leadership communication at new sites | |
| Staggered launch | Weeks 3-4 | Launch 1-2 new sites at a time (not all at once). Monitor closely. | |
| Stabilization | Weeks 5-8 | Monitor new sites daily for 2 weeks, then weekly. Address issues quickly. | |
| Full operations | Week 9+ | All sites in regular data review cadence. Quarterly prioritization meetings include all sites. | |

Scale-Up Risk Register

| RISK | LIKELIHOOD | IMPACT | MITIGATION |
|------|------------|--------|------------|
| | D | | |

| | | | |
|--|--------|----------|---|
| Low response volume at new sites | Medium | Medium | Apply participant recruitment strategies (Doc 4). Monitor daily for first 2 weeks. |
| Staff resistance at new sites | Medium | High | Deploy full Staff Buy-In Toolkit. Identify and address objections early. |
| Technical failures across multiple sites | Low | High | Establish centralized monitoring. Pre-test all hardware. Maintain spare equipment. |
| Data overwhelm (too much data to act on) | Medium | Medium | Use Prioritization Toolkit. Focus on 3-5 highest-impact items per quarter. |
| Loss of executive sponsorship | Low | Critical | Document ROI of pilot. Connect feedback data to funder outcomes. Keep sponsor engaged with quarterly briefings. |
| Participant trust erosion | Low | Critical | Maintain anonymity rigor at all sites. Never compromise suppression rules. Post “What We Heard” updates. |

Final Sign-Off

Scale-up approved by: _____ Date: _____

Sites approved for expansion: _____

Target launch dates: _____

End of Toolkit

For implementation support, contact your Pulse For Good account manager or visit pulseforgood.com

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