

Worked Example: A Promising Pilot

Illustrative scenario. The people, organization, figures, and events below are invented for teaching. The thresholds are choices for this scenario, not universal standards or evidence that the method guarantees results.

The situation

On Monday, Priya, an operations manager, must recommend whether to expand a new internal request-routing process. In a two-week pilot, six experienced volunteers handled 40 routine requests. The recorded median completion time was 18 minutes, compared with 24 minutes for 40 routine requests handled under the old process the previous month.

That difference looks promising, but the groups were not assigned randomly or matched for difficulty. The pilot excluded urgent and unusual requests. Two pilot requests needed rework; comparable rework records for the earlier group are incomplete. The figures show what was recorded, but do not establish that the new process caused the faster times or would perform as well across the department.

The director wants a recommendation by Friday. There is no contractual requirement to expand that week. Waiting would delay possible gains and require staff to maintain two processes. Expanding would expose more work to a process that has not yet been tested under ordinary staffing and varied demand.

Priya can recommend a bounded extension. The director must authorize staff time; a team supervisor must confirm that the old process remains available for fallback. Priya needs to specify what the extension would reveal and how its results would affect the decision.

How to read the completed brief

The recommendation includes a small comparison, a time limit, and explicit review rules. It is designed to reduce important uncertainty, not produce certainty from a small sample.

The proposed extension assigns the next 40 eligible routine requests alternately to the old and new processes across normal shifts, using trained staff with mixed experience. It records request difficulty, total completion time including rework, and missed internal deadlines. Urgent and unusual requests remain on the established process.

Alternating assignment may still produce different case mixes. Priya will report those differences rather than attribute every result to the process. Even favorable findings would support only a staged expansion for routine requests; they would not establish suitability for excluded work.

What happens after the decision?

No improvement is assumed. The extension may reveal slower work, hidden rework, inconsistent results, or insufficient volume. Priya will review at two weeks even if fewer than 40 requests arrive. An inconclusive result leads to a new explicit decision about further testing, redesign, or stopping, rather than an automatic extension.

Completed Decision Brief

Decision owner: Priya, operations manager

Date: Monday, Week 1

Decision needed by: Friday, Week 1, noon

1. Define the decision

What must I decide?

Should I recommend full expansion, a bounded comparison, or keeping the established process?

What outcome am I trying to achieve?

Improve routine-request handling without accepting unexamined rework or service disruption.

2. Examine the situation

What facts can I verify?

Recorded medians are 18 minutes for 40 pilot requests and 24 for 40 earlier requests. Six experienced volunteers ran the pilot. Two pilot requests needed rework. Earlier rework data are incomplete; urgent and unusual work was excluded.

What am I assuming, and what remains unknown?

The apparent gain may reflect staff or case differences. Performance on normal shifts, total effort, and comparable error rates remain uncertain.

What limits my options?

Staff time needs approval. Fallback must remain available. Friday is a recommendation deadline, not a required expansion date.

3. Compare realistic options

Option	Main benefit	Main risk or tradeoff
A. Expand now	Could realize gains sooner	Exposes more work to uncertain performance
B. Run a bounded comparison	Tests routine work on normal shifts	Uses staff time; findings may remain inconclusive
C. Keep established process	Avoids change and test costs	Forgoes possible gains; uncertainty remains

4. Test the preferred option

Preferred option: B, subject to staffing and fallback approval.

Test	My assessment
Right	Tell affected staff what is being tested; keep excluded work on the established process.
Smart	Compare the next 40 eligible requests across both processes; record difficulty, total time, rework, and missed deadlines.
Sustainable	Cap the test at two weeks or 40 requests, whichever comes first. Name a supervisor to monitor it and maintain fallback.

Without staffing or fallback approval, recommend C and report the unresolved questions.

5. Commit to a next step

My decision and main reason:

Recommend a limited comparison. The pilot supports investigation, but does not yet justify department-wide expansion.

First action: Agree staffing, recording, and review rules with the supervisor and director. **By when:** Friday noon; begin only after approval.

Who needs to know or act?

Director authorizes; supervisor monitors and can halt the test; participating staff record results; I assess the evidence.

6. Set the review point

What new evidence or change would make me reconsider?

Pause if a request is lost or a test-related deadline is missed. Consider staged routine-only expansion if median total time is at least 10% lower, rework is no higher, and case differences do not undermine the comparison. Otherwise revise, stop, or seek more evidence explicitly.

Review date: Two weeks after the approved start, or at 40 requests if earlier; immediately on a pause trigger. Mixed or sparse results remain inconclusive.

Judge the reasoning using what was knowable at the time. A good process cannot guarantee a good outcome.