A Promising Pilot

Fictional scenario

All people, organizations, figures, and events in this example are fictional. Thresholds illustrate a decision rule chosen for this situation; they are not universal standards.

Priya, an operations manager, must recommend by Friday whether to expand an 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. Two pilot requests needed rework, but comparable rework records for the earlier group are incomplete.

The groups were not randomly assigned or matched for difficulty. Urgent and unusual requests were excluded. These observations do not establish that the process caused faster handling or will work across the department. Friday is a recommendation deadline, not a contractual expansion date. Waiting delays possible gains and requires two processes to remain available; expansion exposes more work to uncertainty.

Priya can recommend a bounded comparison. The director must approve staff time and the supervisor must maintain fallback. The next 40 eligible routine requests would be assigned alternately across the old and new processes on normal shifts with trained staff of mixed experience. The record would include difficulty, total completion time including rework, and missed internal deadlines. Alternating allocation may still leave case differences. Even favorable findings would only support staged expansion for routine work.

The completed review below illustrates a mixed result after this fictional decision. It does not establish a successful outcome or resolve suitability for excluded work.

Completed Decision Brief

1. Define the decision

Decision owner, date, and decision needed by

Priya, operations manager; Monday, Week 1; recommendation due Friday noon.

Choice and intended outcome

Recommend expansion, a bounded comparison, or retaining the established process. Improve routine-request handling without accepting unexamined rework or disruption.

Principles, responsibilities, and authority

Director approves staff time. Supervisor confirms and maintains fallback and can halt the comparison. Urgent and unusual work stays on the established process.

2. Examine the situation

Verified facts and sources

Pilot log: 40 routine requests, median 18 minutes, six experienced volunteers, two reworks. Previous-month log: 40 requests, median 24 minutes, incomplete rework records. These are unmatched observations.

Assumptions and important unknowns

Case difficulty, staffing, and omitted rework may explain the apparent gain. Performance across normal shifts and comparable error rates remain unknown.

Decisive gap and how to investigate it

Obtain comparable total-time and rework records across normal shifts. Supervisor checks the recording sheet and staff training before launch.

Pressure and constraints affecting judgment

Director wants a recommendation Friday. Enthusiasm for faster times may encourage expansion. Staff time and reliable fallback constrain any test.

3. Compare realistic options

Option A: approach, main benefit, and risk or trade-off

Expand now. May gain capacity sooner; exposes more work to uncertain performance and errors.

Option B: approach, main benefit, and risk or trade-off

Bounded comparison. Tests routine work under more ordinary conditions; costs staff time and may remain inconclusive.

Option C: approach, main benefit, and risk or trade-off

Retain the established process. Avoids change and testing costs; forgoes potential gains and leaves uncertainty unresolved.

4. Test the preferred option

Preferred option, strongest objection, and condition before proceeding

B, only with approved staffing and fallback. Strongest objection: alternating assignment can still produce incomparable case mixes.

Right: principles, responsibilities, and required agreement

Explain the test to participating staff. Protect service obligations and excluded work. Director authorizes resources; supervisor can pause.

Smart: evidence, uncertainty, and reasons over alternatives

Record difficulty, total time, rework, and missed deadlines. Consider expansion only if total median time is at least 10% lower, rework is no higher, and case differences do not undermine comparison.

Sustainable: capacity, recurring demands, and acceptable limits

Limit to two weeks or 40 requests, whichever comes first. Supervisor monitors and maintains fallback. No automatic extension.

5. Commit to a next step

Decision, rationale, and condition before proceeding

Recommend B because the pilot justifies investigation but not full expansion. If approval or fallback is unavailable, recommend C and report the gaps.

First action, owner, and deadline

Priya agrees staffing, recording, and review rules with director and supervisor by Friday noon. Begin only after approval.

Communication: who needs to know, agree, or act

Director authorizes; supervisor monitors and can halt; trained staff record observations; Priya assesses evidence and reports limitations.

6. Set the review point

Observable trigger for reconsideration

Pause if a request is lost or a test-related deadline is missed. Mixed results require an explicit choice to redesign, stop, or investigate further.

Review date and what evidence to bring

Two weeks after approved start, or at 40 requests if earlier; immediately on a pause trigger. Bring case mix, total-time, rework, and deadline records.

Completed Decision Review

Fictional follow-up: mixed results, with no full expansion.

1. Recall the decision

Decision owner, review date, and original brief reference

Priya; two weeks after approved start; reference: A Promising Pilot, Monday Week 1 brief.

Original decision and reasons

Run a bounded comparison with staffing approval and fallback. Avoid full expansion on the original unmatched observations.

Expected result, timeframe, and accepted uncertainty

A small comparison might clarify routine-work performance. Expansion required at least 10% lower total median time, no higher rework, and a defensible case comparison. Inconclusive results were accepted as possible.

2. Compare expectation with evidence

Actual result and supporting evidence or sources

Fictional test log: 32 eligible requests, 16 per process. New-process median total time 21 minutes; established process 23 minutes. Rework: two new-process requests, one established-process request. No requests lost or internal deadlines missed.

What remains unresolved or too early to judge

The roughly 9% median difference is below the chosen 10% rule. Small samples and case differences prevent a firm causal conclusion. Excluded work remains untested.

3. Check the assumptions

Original assumptions, current evidence, and status: supported, contradicted, or uncertain

Routine requests would arrive fast enough: contradicted, only 32 arrived. Staff could record total time: partly supported; two records needed clarification. New routing would reduce effort without higher rework: uncertain and not supported by this comparison.

What should have been investigated, and what could not reasonably be known then

Staff training and fallback were checked before launch. Arrival volume was estimated too confidently. The small sample could not establish long-term performance or suitability for urgent work.

4. Review reasoning and execution

Reasoning given the evidence, alternatives, principles, and constraints known then

A limited test respected authority and made the evidence gap visible. The rule prevented selective use of a favorable speed figure. The original unmatched pilot did not justify expansion.

What was carried out, what changed, and why

Staffing and fallback were approved. The supervisor ended the test at two weeks as planned and checked two unclear time entries with staff. The test did not reach 40 requests.

Outside influences and what could reasonably have been anticipated

Lower demand reduced volume. Case complexity varied. Demand variation was foreseeable, which is why the time cap mattered; its exact pattern was outside Priya's control.

5. Choose the adjustment

What to keep, change, or investigate next, and why

Do not expand. Return routine work to the established process while investigating the two new-process reworks and the recording burden. A fresh test needs a revised design and explicit approval.

Next action, owner, deadline, and communication

Priya and supervisor examine the five rework records across both original pilot and comparison by next Friday and report possible causes and data limits to the director.

6. Close or revisit

Status: close review, continue current action, or revise decision

Revise decision: stop this comparison and retain the established process pending a new proposal.

Observable trigger and date for another review

Review next Friday with the rework assessment. Reconsider sooner if a previously missed service issue appears. Further testing requires a new brief and resource approval.