Onboarding pilot review checklist

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Onboarding pilot review checklist

Review an Onboarding Pilot Before Extending It

Introduction and Checklist Purpose

Use this checklist to decide whether a limited onboarding pilot needs more review before you recommend an extension. Operations managers and decision-makers should work through each item in order, using the supplied pilot record as their starting point.

The decision is whether to extend a pilot-not whether to authorize a company-wide rollout. Treat the results as observations about the participants and period studied, not proof that the checklist caused a change. Before you begin, gather the pilot record and identify who will make the extension decision.

Pre-Task Preparation

- ☐ **[Critical] Confirm the decision scope.** Record that the proposal concerns a limited pilot extension, not company-wide implementation. The supplied record does not authorize a company-wide rollout.
- ☐ Identify the operational question decision-makers need answered before choosing whether to extend.
- ☐ Record what evidence would change the decision. If the current record is insufficient for the decision and no specific question can be answered by further observation, document the uncertainty.
- ☐ Review the supplied evidence pack using Review the source pack before extending the pilot.
- ☐ If preparing an editorial summary, compare it with the content brief using Check a draft against its brief.

Main Checklist Items

Phase 1: Verify the Pilot Record

- ☐ **[Critical] Confirm the cohort and period.** PILOT-01 describes 24 volunteers observed over four weeks.
- ☐ Verify that all 24 participants received the new onboarding checklist.
- ☐ Record that the pilot had no comparison group. Do not describe it as a controlled comparison.
- ☐ Keep conclusions limited to what happened for this volunteer cohort during the four-week period.

Phase 2: Check the Reported Results

- ☐ Confirm that PILOT-02 reports 30 support requests in week one and 18 in week four from the same cohort.
- ☐ Label both figures as counts of requests, not counts of people.

- ☐ Check the arithmetic: 30 requests − 18 requests = 12 fewer requests.
- ☐ Check the relative calculation: (12 requests ÷ 30 requests) × 100 = a 40% decrease from the week-one count.
- ☐ Describe the 12-request and 40% changes as descriptive results for those weeks, not as effects caused by the checklist.

Phase 3: Identify Evidence Gaps

- ☐ **[Critical] List every unmeasured area identified in PILOT-03:** time-to-productivity, completion quality, costs, non-volunteer outcomes, seasonality, and results after week four.
- ☐ State that exposure and task mix were uncontrolled. Do not imply that either remained constant.
- ☐ Record that the pilot design cannot show what would have happened without the checklist.
- ☐ Keep outcomes for non-volunteers unresolved; the volunteer results do not establish whether the same pattern applies to them.

Critical Items to Double-Check

> **WARNING:**
> Do not present the 40% decrease as a proven reduction caused by the checklist. Do not generalize results from 24 volunteers to non-volunteers or a company-wide rollout.

- ☐ Check that the summary separates observed request counts from explanations for why they changed.
- ☐ Verify that it does not claim the pilot established faster onboarding, improved work quality, lower costs, or lasting results. Those outcomes remain unmeasured.
- ☐ Confirm that possible explanations for the request-count change remain unresolved, rather than appearing as findings.
- ☐ Keep scope, period, units, design limits, and qualifications next to the claims they describe.

Common Items Often Missed

- ☐ Check that the counts refer to support requests, not individual employees.
- ☐ Include the uncontrolled exposure and task mix when describing the week-one and week-four comparison.
- ☐ State that no comparison group was used; repeating the same observation alone would not address that limitation.
- ☐ Keep the absence of company-wide authorization visible in the decision record.
- ☐ Avoid treating unmeasured outcomes or proposed future measures as established pilot results.

Completion Verification

Before making a recommendation, verify that the record is complete and internally consistent:

- ☐ Confirm the summary retains the 24-volunteer cohort, four-week period, checklist exposure for all participants, and absence of a comparison group.

- ☐ Recheck the support-request counts, units, subtraction, and percentage calculation.
- ☐ Confirm that all six PILOT-03 evidence gaps and the uncontrolled exposure and task mix are visible.
- ☐ Check that every result is labeled as observed and that no unsupported causal explanation appears.
- ☐ Verify that a proposed extension names its unresolved question, measures, and review period before additional information is collected.
- ☐ Confirm that the proposal remains distinct from a company-wide rollout.

If any check remains open, revise the evidence summary or clarify the proposed review before making the extension decision.

Next Steps After Completion

Choose the next step according to the question and evidence still missing:

- ☐ **Do not extend** if the record is insufficient and further observation has no specific question to answer. Document the uncertainty. This does not establish that the checklist is ineffective.
- ☐ **Consider a bounded extension** only after naming the gap it will address, the measures to collect, and the review period. Possible gaps include time-to-productivity, completion quality, costs, non-volunteer outcomes, seasonality, or results after week four.
- ☐ **Clarify the comparison needed** if decision-makers need to assess whether the checklist contributed to a change. Define what comparison would help; the current pilot has none.

Do not promise a particular outcome from an extension. Keep observations, interpretations, and remaining uncertainties distinct in the decision record.

Conclusion

The pilot recorded fewer support requests in week four than in week one. But it does not show why the numbers changed.

Before recommending a next step, use the checklist to check the pilot's scope, calculations, limits, and outcomes that were not measured.

Follow the checklist in order. Check off each item only after you complete it.

> 💡 **PRO TIP**
> Before comparing the 30 and 18 support requests, verify that the reporting weeks use the same request definition. Exposure and task mix were uncontrolled, so the 40% descriptive decrease does not establish a causal effect or authorize a company-wide rollout.

References

1. Reference material