

S3P3-1: Pilot Monitoring Framework

Purpose:

Track how each customer touchpoint performs during the pilot compared to its expected outcome. Ensures issues are surfaced in real time, not only at the end of the pilot.

Example Table – Onboarding Pilot

| Touchpoint | Expected Emotion | Action Delivered | Response Observed | Action Score (0-10) | Response Score (0-10) | Value Score (A × R) | Notes |
|---------------------|------------------|--------------------------|------------------------------------|---------------------|-----------------------|---------------------|--|
| Account Setup Email | Confidence | Email sent on time | 40% of customers called for help | 8 | 4 | 32 | Needs clearer wording; tech jargon too heavy |
| Welcome Call | Reassurance | Calls made within 48 hrs | Positive feedback, felt personal | 7 | 9 | 63 | High trust, keep script and tone |
| First Invoice | Neutral | Automated billing run | High complaints of errors | 6 | 2 | 12 | Known weak spot, must be fixed before scale |
| Service Delivery | Trust | 85% visits on time | Customers frustrated by 15% delays | 7 | 5 | 35 | Scheduling system under pressure |
| Feedback Request | Heard / Valued | Email survey sent | Only 20% response rate | 7 | 3 | 21 | Survey timing too late in journey |

How to use:

- Compare Action vs Response for each touchpoint to see alignment.
- Use Value Score to prioritise fixes (highest leakage = highest priority).
- Update weekly during the pilot to catch misfires early.

What's Different from Earlier Tools:

- Moves beyond design (S3P1) into real-world measurement.
- Explicitly ties pilot monitoring to ARP scoring ($A \times R$).
- Provides granular insight at the touchpoint level.

Uses:

- Identify critical fixes before full rollout.
- Provide pilot sponsors with evidence of what is working vs. failing.
- Build credibility by showing customer voice is acted on immediately.