Trial plan

Define success, the process, and the decision before the first login.

A trial answers a decision question. Agree on a few measurable criteria and a final review before the trial starts.

COMPLETED EXAMPLE - FICTIONAL

Lindenworks Reporting, 5-16 Oct. Criterion: create the monthly report from the same data in no more than 4 hours versus 8, measured by Finance. Also: two sources connected, 20 spot checks correct. Review 19 Oct with Finance and budget owner; figures are fictional.

Account / trial owners on both sides	Start / end / review

Decision question / business case / explicitly out of scope

1 Agreed success criteria

Criterion / metric	Baseline > target	Method / data / owner	Confirmed by / date

Trial plan

Continue the worksheet. Separate facts, assumptions and commitments.

2 Readiness and resources

Data / access / task	Owner + due date	Dependency / status

Check-in(s): dates + participants

Final review: date + decision-maker

Decision rule: What follows success, partial success or stopping?

Result for each criterion + evidence / remaining gap

Joint decision / next step / owner / date

COMPLETION CHECK

- [ ] Both sides understand the business case.
- [ ] Success criteria and measurement methods are agreed.
- [ ] Resources and owners are available.
- [ ] Check-ins and the final review are scheduled.
- [ ] The decision to make after the trial is clear.