CONDUCTING PROPER PILOT TESTING

DigitalMeasures

TABLE OF CONTENTS

INTRODUCTION

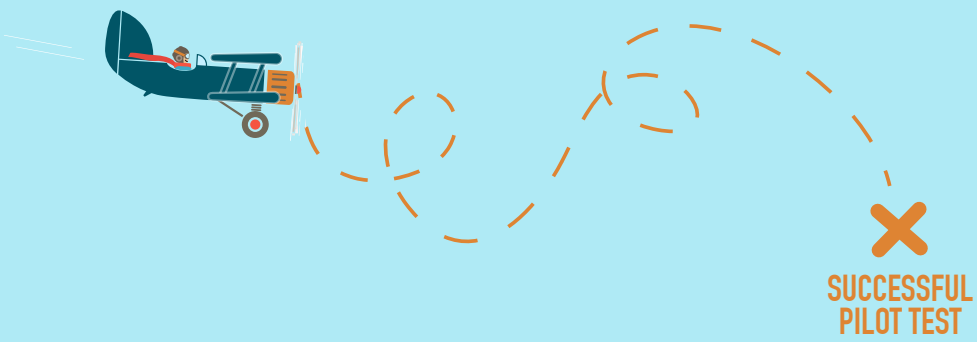
A faculty activity reporting system can revolutionize how your organization handles annual reporting, accreditation and other vital tasks — but implementing such a system campus-wide is a large undertaking.

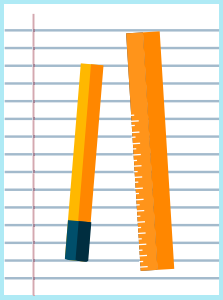
To ensure success, the implementation process should include careful planning and preparation. Pilot testing is the easiest way to eliminate risk and incorporate feedback while rolling out the software to your university. Pilot testing gives your university a solid foundation for success with this technology investment and encourages faculty to become champions of the new system.

PILOT TEST TO ENSURE:

1. The solution is faculty-friendly
2. Terminology is understandable
3. Faculty can easily identify where to enter information
4. All types of faculty information have a home
5. Reports output information in logical locations
6. Information is properly loaded from other databases
7. Faculty can easily access the system

Pilot testing should be done systematically to ensure accuracy and positive results. This guide discusses best practices for effective pilot testing of faculty activity reporting software.





CHAPTER ONE

LAY GROUNDWORK FOR SUCCESS

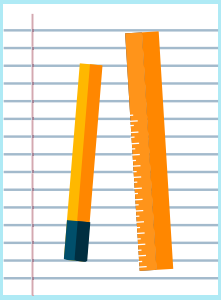
It's tempting to jump into pilot testing without sufficient preparation. A little preparation now will save tons of time later. Here are the recommended materials you should prepare to ensure successful pilot testing:

1. CREATE A TIP SHEET

The question that comes up most frequently when faculty begin using the system is where certain types of information should be entered. A tip sheet that lists each screen and the types of activities that should be stored in it, as well as other helpful tips about the system, can be extremely beneficial for pilot testers. For example, a screen named "Academic and Professional Performances and Exhibits" might be where faculty should enter information about designing theater scenery.

Note that tip sheets and user guides should help pilot testers learn the system, but they shouldn't need to rely on them — the system and terminology should be intuitive enough for them to understand. Be aware if faculty are struggling to remember or understand what various screens mean, as that is an indicator additional customization is in order.

TIP SHEETS AND USER GUIDES HELP PILOT TESTERS LEARN



CHAPTER ONE

LAY GROUNDWORK FOR SUCCESS

continued

2. CREATE A WAY TO TRACK ISSUES

This is an easy but vital part of a pilot testing program. The goal of pilot testing is to identify areas to improve or change before a full-scale rollout, so centralizing feedback is essential. You will receive a great deal of feedback during this process, so you'll need an easy way to quickly document feedback immediately after receiving it, before it is forgotten. The person managing the pilot testing should have a spreadsheet where all user issues and other feedback are stored for analysis, evaluation and to close the loop on introducing changes to the system. You will want to track the source of the feedback, the date it was received, the specific feedback and its status.

3. CREATE A PILOT SURVEY

At the end of each pilot test, you will want to ask all participants about their experience. Prepare a survey so you can ask a consistent set of questions. Be sure to ask their opinions of the software, its usability, understandability of screens and fields, the pilot test itself, the reports generated and anything else that is important to your university. You may tailor the survey as you go through additional rounds of testing and uncover specific issues, but it is good to start with a consistent set of questions.

CHAPTER TWO

PREPARE FOR A PILOT TEST

Before any implementation begins, it's important to prepare for your first pilot test, beginning by identifying your first test group. Keep in mind that the following steps will likely change for each pilot test, so you'll want to reexamine these each time.

1. IDENTIFY THE ACADEMIC UNIT FOR TESTING

The best way to start a pilot test is to limit your participants to a group within one academic unit. Because faculty from different academic units do different types of work, focusing on one unit at a time ensures the needs of each are met. It also makes the test easier to manage, and you can systematically work through other units later on.

Who should you choose? For your first pilot group, you're looking for a "quick win" — a group of faculty and staff you can get onboard quickly while learning the system yourself. It may be tempting to overcome your biggest challenge right off the bat by choosing an academic unit such as liberal arts, the most diverse and therefore complicated faculty body, to pilot test first. However, this strategy is not recommended because they are generally not as familiar with external reporting such as for professional accreditation.

Instead, a professional school such as education, business, law or engineering is generally best, as they usually have professional accreditation and are therefore already familiar with reporting to an external organization. It is especially helpful if the academic unit is eager to get started with the new system, so take that into consideration as well.

CHAPTER TWO

PREPARE FOR A PILOT TEST, *continued*

2. DETERMINE THE LOCATION

It's a good idea to hold pilot testing sessions in person at least initially, until you're comfortable having faculty work through the system remotely. Part of your pilot test plan should include a location where these sessions can take place, such as a computer lab or conference room with space for everyone to work. To maximize participation by faculty, the location should be convenient for those participating in your pilot test, such as a room within their primary building or nearby.

3. DETERMINE THE REPORTS TO EXAMINE

Remember that the whole point of implementing a faculty activity reporting system is to generate reports, so running and evaluating reports is a crucial step during a pilot test. Note that you may want testers to evaluate different reports based on their academic unit. Prior to conducting a pilot test, determine the specific reports you will have the testers assess. You don't want to tell them to "try out the system and let us know what you think." You need to give specific instructions so you can get meaningful feedback. It's imperative that you not only have faculty enter data into the system, but also run reports on that information to examine the result of their work, so incorporate this into your testing script.

The best way to do this is to have faculty bring copies of actual reports they've submitted in the past — for example the report submitted for last year's annual faculty activity report — and have them compare to reports generated by the system. Ask for feedback on how they would feel about submitting the report from the system rather than the copy they brought, and if there is anything important missing from the new report. This will result in very specific and rich feedback.

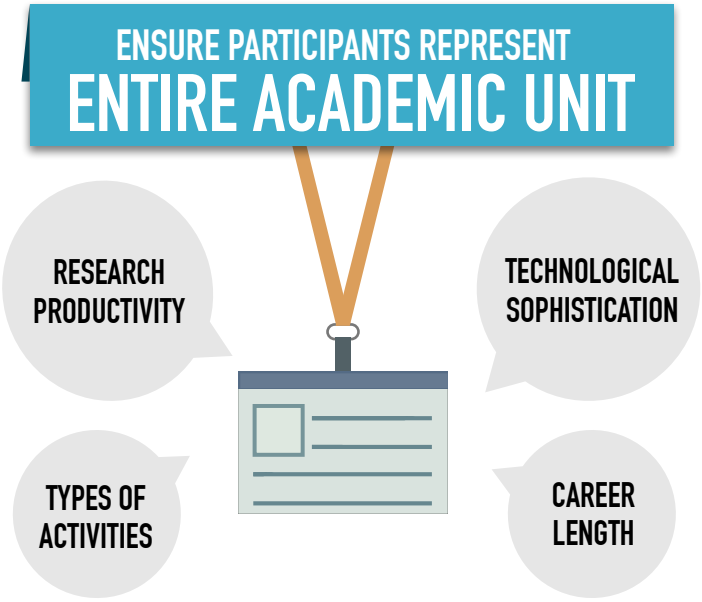
CHAPTER TWO

PREPARE FOR A PILOT TEST, *continued*

4. CHOOSE YOUR PARTICIPANTS

Once you've identified your first academic unit, you want to choose faculty to participate. Ideally, pilot testing groups should be limited to five to 10 people. Starting small ensures you will be able to manage feedback effectively and makes implementation smoother for future users.

Ensure your group of participants is comprised of faculty who represent the entire academic unit in terms of career length, research productivity, types of activities and technological sophistication. It may be tempting to choose all junior faculty to pilot test, as they have less data to enter, are generally more accepting of change, may be more comfortable with new technology, and are often more willing to take on new projects. However, this strategy will not result in a representative or effective pilot test.



CHAPTER THREE

CONDUCT A PILOT TEST

Now that you've done all your preparation work, it's time to conduct your initial pilot test with your selected group.

1. EDUCATE PARTICIPANTS

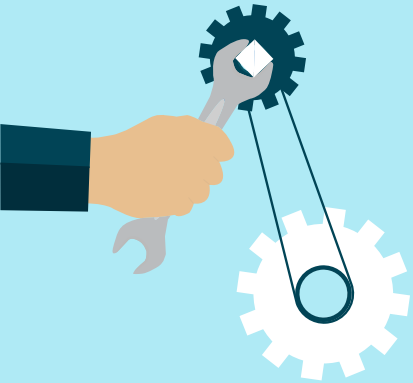
Introduce the software and its goals to the group, explain the pilot process and stress the importance of their candid feedback. Since this is additional work outside of their regular duties, it's important to build excitement about the process to ensure follow-through. Faculty will appreciate that you're asking for their input, so be sure to emphasize that you're holding the test to obtain it. Emphasize the benefits the new system will bring specifically to them, not just to the university and administration, in the form of fewer requests for information throughout the year and easier reporting for things like annual reviews and grant opportunities. Provide a quick overview of how to use the software and provide the tip sheet referenced previously.

2. EXECUTE THE TESTING

Each session should take between 60 and 90 minutes. Allow participants to explore the software and enter the information necessary to assess the reports that you identified in Chapter 2, "Determine the Reports to Examine." As mentioned earlier, the pilot test should be held in person, so be sure to have at least one point person available to answer questions during each testing session. Once you feel comfortable letting faculty conduct testing remotely, ensure they know who to contact when they have questions and feedback. This ensures faculty are able to share their thoughts immediately and important feedback is not forgotten.

3. ADMINISTER THE SURVEY

Your survey will enable participants to answer a range of questions determined by you, but encourage participants to share feedback throughout their pilot test. They may have initial thoughts or opinions when they notice something in the moment that they forget when they fill out their survey.



CHAPTER FOUR

CUSTOMIZE THE SYSTEM & HOLD ADDITIONAL TESTS

Once your pilot test is complete, you should have plenty of feedback to take next steps.

1. REVIEW RESULTS AND DRAW CONCLUSIONS

Review your participant surveys, as well as all feedback, questions and issues raised during the initial pilot. Group this material into similar categories (the survey will help with that), but don't disregard a comment just because only one person mentioned it.

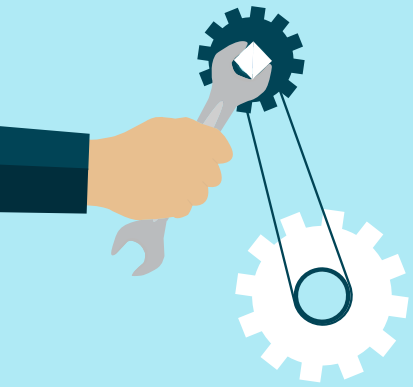
2. MAKE APPROPRIATE CHANGES TO THE SYSTEM

Before starting your next pilot test, take the feedback from your first test and apply it by customizing the system. This is the time to ensure the system is tailored to the needs of your faculty and staff. It's important to use good judgment to ensure the solution is customized to your university's needs without becoming difficult to use, while still enabling all the necessary reports to be built.

If your pilot group was representative of the academic unit, the feedback you received is feedback you'll hear from other faculty as well. The most productive course is to make changes when you identify the need, to make each pilot test smoother and more efficient. And, of course, some faculty may push back against a new system altogether, so negative comments may need to be considered in that light.

CONSIDER CHANGES TO ENSURE:

1. Terminology is unambiguous
2. That there is a home for the bulk of faculty activity so that they're not using an "other" category to record important activities
3. Faculty are not asked to enter the same information in multiple places within the software
4. Information entered by faculty shows up on reports, that it appears in expected locations and that all important fields of information display



CHAPTER FOUR

CUSTOMIZE THE SYSTEM & HOLD ADDITIONAL TESTS, *continued*

3. HOLD ADDITIONAL PILOTS THROUGHOUT THE REST OF THE ACADEMIC UNIT

Starting with Chapter 2, repeat the entire process again with another test group of the same size within the same academic unit. Continue doing so, gradually increasing the size of the pilot group, until you've piloted the entire academic unit. Though this process may seem tedious, it is the most efficient way to pilot test, ensuring your new software fits the needs of your university while encouraging buy-in from faculty and staff. Holding many pilot tests doesn't have to take a long time, as they can be scheduled in relatively quick succession and only take an hour each; this approach consumes more time on the part of the person administering the tests, but it's worth it.

USE THIS PACE:

JUST 4 HOURS OF TESTING = SUCCESS WITH 40 FACULTY MEMBERS

4. REPEAT THIS PROCESS FOR ALL ACADEMIC UNITS

Repeat the steps above for the rest of your academic units. Continue to work through your professional schools first, starting each time with a pilot group of five to 10 participants, then increasing as you go. Be sure to use consistent processes for each pilot group, document the results and continue to apply your findings from each pilot to enhance and customize the software to your specific needs.

CONCLUSION

Effective pilot testing significantly improves a university's success with any new software, particularly highly customizable software such as a faculty activity reporting system. Though pilot testing increases the implementation lead time, the benefits are well worth it. The system will be set up from the start how your faculty and university need and want to use it, which will:

1. Increase buy-in
2. Increase utilization
3. Reduce errors and issues
4. Reduce frustration
5. Eliminate wasted time
6. And much more

ABOUT DIGITAL MEASURES

Digital Measures focuses exclusively on web-based data management and reporting for universities. Activity Insight, its popular faculty activity reporting solution, is trusted by 60% of the largest 500 universities in the United States and universities in more than 15 countries. The Milwaukee, Wisconsin-based company was founded in 1999.

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