

Clover ERA Pilot Planning Worksheet

A step-by-step guide to scoping your successful pilot implementation

This worksheet will guide you through the key decisions needed to launch a successful Clover ERA pilot. A well-planned pilot typically runs 60-90 days and involves 3-5 managers to demonstrate clear ROI before broader rollout. Take time to thoughtfully complete each section with your implementation team.

1. Pilot Overview & Objectives

What specific business challenges are you looking to address with this pilot?

(e.g., high turnover in specific departments, low engagement scores, burnout concerns)

Primary Challenge:

What does success look like for this pilot?

(Be as specific as possible: reduction in turnover, improvement in engagement metrics, etc.)

Success Definition:

Who is the executive sponsor for this pilot?

Executive Sponsor Name & Title:	Why they are sponsoring this pilot:

2. Pilot Team Selection

Which department(s) or team(s) will participate in the pilot?

(Best practice: Start with 1-2 teams that have visible challenges and motivated managers)

Department/Team	Why Selected	Team Size	Manager Name

Selection criteria for pilot managers:

- ☐ Manages at least 5 direct reports (sufficient sample size)
- ☐ Has been in role for 3+ months (established relationships)
- ☐ Open to trying new approaches and providing feedback
- ☐ Currently faces team engagement or retention challenges
- ☐ Influential among peer managers (can advocate for broader rollout)
- ☐ Comfortable with technology and daily check-ins

3. Baseline Metrics & Data Collection

Gather these baseline metrics before pilot launch:

Metric	Current Value	Data Source	Collection Date
Overall turnover rate (pilot teams)			
Voluntary turnover rate			
Average tenure (pilot teams)			
Open positions (pilot teams)			
Time to fill positions			
Cost per hire			
Most recent engagement score			
Absenteeism rate			
Manager span of control			

Who will be responsible for collecting and tracking these metrics?

Data collection owner:

4. Success Criteria & Target Outcomes

Define specific, measurable targets for pilot success:

Outcome Metric	Current Baseline	Target Improvement	Timeframe
Primary: Turnover reduction		% reduction	90 days
Primary: Engagement increase		% or point increase	90 days
Secondary: Manager confidence		Survey score	60 days
Secondary: Early warning signals		# detected	Ongoing
Secondary: Intervention success rate		% resolved	90 days

Minimum criteria to declare pilot successful:

- ☐ Measurable improvement in at least 2 primary metrics
- ☐ 80%+ manager adoption (using system daily)
- ☐ 3+ documented success stories or interventions
- ☐ Positive manager feedback (satisfaction score 7+/10)
- ☐ ROI calculation shows positive business impact
- ☐ No negative unintended consequences observed

5. Pilot Timeline & Milestones

Recommended 90-day pilot timeline:

Phase	Duration	Key Activities	Date Range
Pre-Launch	2 weeks	Manager training, baseline data, system setup	
Launch	1 week	Team kickoff, first daily reflections	
Month 1	4 weeks	Daily usage, weekly manager check-ins	
Mid-Pilot Review	1 week	Progress assessment, adjustments	
Month 2	4 weeks	Continued daily usage, intervention testing	
Month 3	4 weeks	Final data collection, ROI analysis	
Results Review	1 week	Final presentation to stakeholders	

Critical milestone dates:

Milestone	Target Date	Owner
Pilot kickoff meeting		
First week completion		
30-day review		
60-day review		
Final results presentation		

6. Implementation Support & Resources

Manager training and support plan:

- ☐ Schedule 60-minute manager onboarding session
- ☐ Provide CLOVER Framework overview materials
- ☐ Demonstrate manager dashboard and analytics
- ☐ Practice interpreting daily pulse data
- ☐ Review intervention library and "hacks"
- ☐ Set expectations for daily engagement (5 minutes)
- ☐ Establish communication channel for questions

Who will provide ongoing support during the pilot?

Role	Name	Responsibilities
Internal Champion		Weekly manager check-ins, issue escalation
HR Support		Data access, policy questions, reporting
IT Support		Technical issues, access management
Clover ERA CSM		Platform training, best practices

7. Communication Plan

How will we communicate the pilot to different stakeholders?

Audience	Message	Channel	Timing
Executive team			Week before launch
Pilot managers			2 weeks before
Pilot team members			1 week before
Broader organization			Launch week
Regular updates			Weekly/monthly

Key messages to emphasize:

- ☐ This pilot helps managers be more effective, not monitors their performance
- ☐ Daily reflections take only 15-30 seconds
- ☐ All individual data is confidential and aggregated
- ☐ Purpose is to catch small issues before they become big problems
- ☐ Managers get real-time insights, not annual surveys
- ☐ Success means better support for teams and managers

8. Technical Requirements & Access

Technical setup checklist:

- ☐ SSO integration requirements confirmed
- ☐ User data file format agreed upon
- ☐ Initial user list provided to Clover ERA
- ☐ Manager dashboard access configured
- ☐ Mobile app access tested (if applicable)
- ☐ Email notification system verified
- ☐ Data security and privacy requirements reviewed
- ☐ Backup data export process confirmed

IT contact and requirements:

Field	Details
IT Contact Name:	
Email:	
Phone:	
Special security requirements:	
Data residency concerns:	
Integration needs:	

9. Risk Management & Contingencies

Potential risks and mitigation strategies:

Risk	Likelihood	Impact	Mitigation Strategy
Low manager adoption	Medium	High	
Technical issues	Low	Medium	
Manager resistance	Medium	High	
Insufficient baseline data	Low	Medium	
Budget constraints	Low	High	
Timeline delays	Medium	Medium	

Decision criteria for scaling or adjusting pilot:

If results exceed expectations, our plan is:

Next departments/teams to add:

Target timeline for full rollout:

Total managers in full rollout:

If results are mixed, what adjustments would we consider?

- ☐ Extend pilot duration to gather more data
- ☐ Add different teams/managers to pilot
- ☐ Increase manager training and support
- ☐ Adjust participation incentives or communication
- ☐ Modify success metrics to be more realistic
- ☐ Focus on specific CLOVER components showing promise

10. Next Steps & Action Items

Complete these actions to prepare for pilot launch:

Action Item	Owner	Due Date	Status
Finalize pilot team and manager selection			
Collect baseline metrics			
Schedule executive sponsor kickoff meeting			
Confirm technical requirements with IT			
Prepare pilot communication materials			
Schedule manager training sessions			
Set up regular check-in cadence			
Create measurement tracking system			
Plan mid-pilot review meeting			
Schedule final results presentation			

Questions or Need Support?

Your Clover ERA implementation specialist is here to help you complete this worksheet and plan your pilot. Schedule a planning session at calendly.com/clive-hays-cloverera/30min or email contact@cloverera.com

Once completed, this worksheet becomes your pilot implementation roadmap. Share it with all stakeholders to ensure alignment and set clear expectations for your Clover ERA pilot success.