

How to Pilot Rebolt

Introduce Rebolt to your team

Introduction

Once you've built internal awareness about Rebolt, it's time to get teams started.

Pilots typically involve one or two teams and last four to six weeks. Participating in a pilot is an opportunity to see how Rebolt enables everyone to solve problems in a fraction of the time and effort, including work they may not have been qualified to handle before.

Below, we explain how to select the best teams for the pilot and gather evidence to present a data-backed case for Rebolt.

People define “pilot success” as users identifying Rebolt as a tool they enjoy using, which significantly improves their productivity in terms of both time and effort.

The Pilot Process

1. Pick the teams or projects you want to pilot Rebolt

List teams eager to try something new, with influence in the organization. Identify the groups on the list that spend significant time:

- Performing repetitive tasks at the computer
- Using Excel, Power BI, CRMs, Retool, Tableau, SAP, or any specific software.

They will be the most likely to be sensitive to friction in their existing process and enthusiastic about a tool that eliminates their biggest pain points and enables new work that was impossible to do before.

Once you have one or two teams in mind, approach them with a proposal with a use case, someone accountable and a timeline. Ask for modifications based on their input.

2. Create a “before Rebolt” survey

The purpose is to gather the end user’s impressions of the current state of the problem, to gauge how well (or not) it is working for them. Focus on obstacles with the current tooling.

Below are sample topics. Adapt them at will. For inspiration, search Slack, Teams and Email looking for the keyword “Rebolt”

Inspiration Survey

1. How much time are you spending on this task?
2. How many people know how to do the task? Is there any “know-it-all” who is responsible?
3. On a scale of 1-5, how easy is the task in place?
4. On a scale of 1-5, how time-consuming was the task in place?
5. On a scale of 1-5, how do you enjoy the task in place?

3. Connect your tools to Rebolt

Connecting your company [tools](#) is essential to experience the value. You might need to request IT keys and permissions. [Contact](#) Rebolt’s team to help (if needed).

Here are the essential ones:

- File storage: OneDrive/Google Drive/Dropbox
- Email: Outlook/Gmail
- Communication: Slack/Teams
- CRMs: Salesforce, HubSpot, Pipedrive, Attio
- Databases: PostgreSQL, MySQL, Access, BigQuery, Snowflake

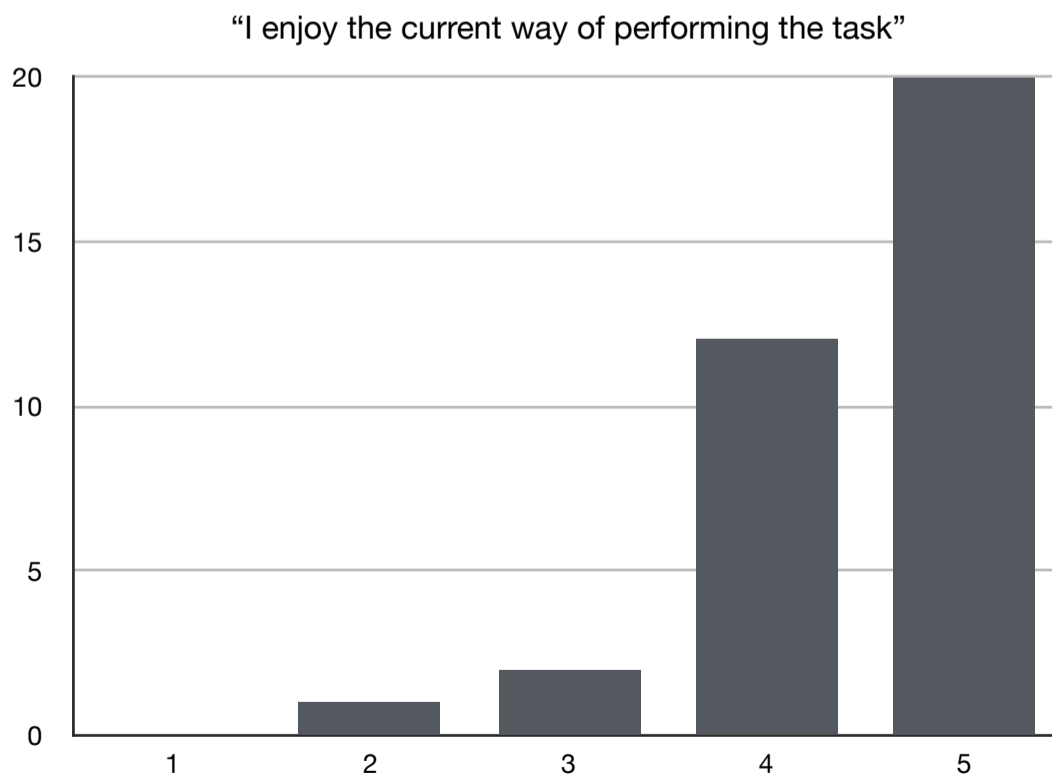
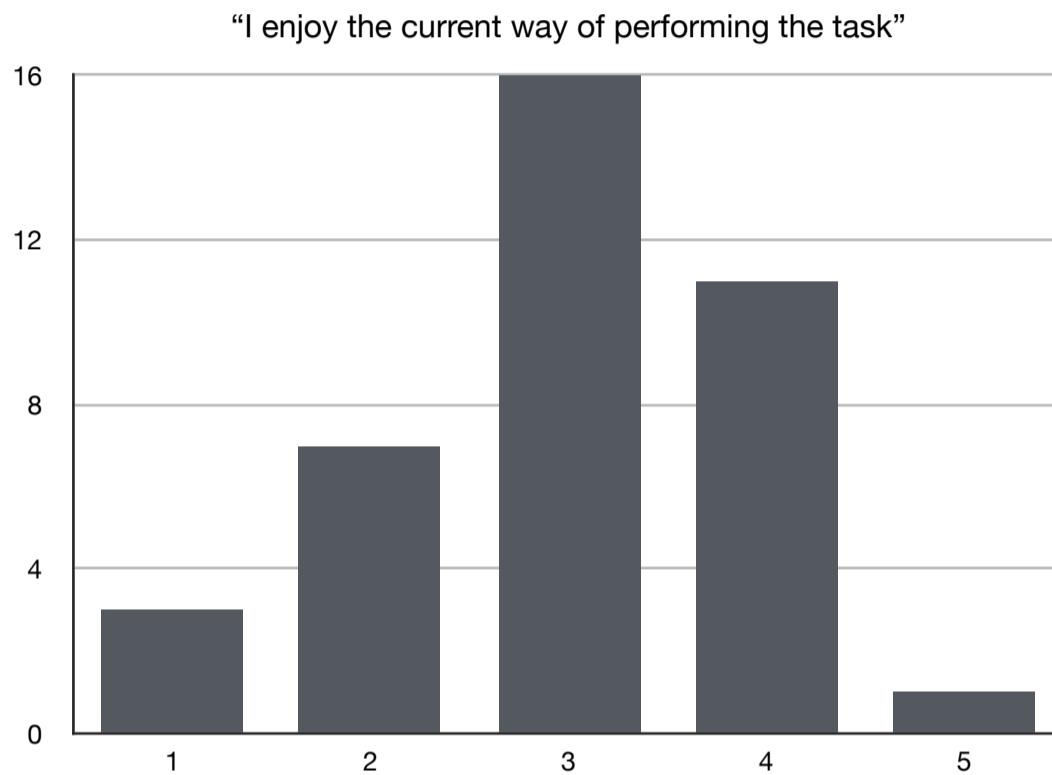
4. Send a post-pilot survey

Reformat the survey questions from step 2. Leave open text fields next to each question to collect extra details. Collect this feedback by a specific date, at least a week before meeting with leadership.

5. Compile data and present the case

Most individuals love Rebolt, but leaders rarely have time to go through lists of anecdotes. Pull out the 4-5 most telling quantitative pieces of evidence and put them side-by-side with your baseline, adding an impactful quote to underscore the value of each metric.

“We found 120% more work completed daily at the end of the pilot.”



Unlock the full potential

A full onboarding is the next step. Learn how to leverage the most out of Rebolt in our [onboarding guide](#).