



# Launching a Successful **Digital Signage Pilot**

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DIGITAL SIGNAGE WHITE PAPER



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We're here to help! If you have any questions about your application or our products, please contact us at **800.572.4935** or **salesteam@visix.com**.

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## Why a Digital Signage Pilot?

A pilot program lets you launch and test your digital signage on a small scale before rolling it out across the entire organization. This lowers risks across the board by letting you assess your goals and resources in a controlled environment.

Whether you're deciding what to purchase, or want to test a system you've already bought, you'll want to evaluate the technology, workflows and content in place, so you can make adjustments before going public.

This also gives you time to get your screen designs just right. Test your layouts, message backgrounds and templates – not only for size and resolution, but to make sure they look great together on screen. You can judge if you have the right number and type of templates for your teams, and whether your contributors might need a little design coaching.

We recommend a pilot launch for 30-60 days. If it's purely a technical run, you should be able to test everything in less than a month. You'll need a little more time if you're judging content and processes. Either way, you need to give your pilot ample time before sitting down with all of your teams – both internal and vendors – to discuss successes and adjustments that need to be made to your original plans.

## Tips for a Successful Pilot

A pilot will increase stakeholder buy-in, since everyone on your team can play a part in the planning, pilot, adjustment and final roll out of the system. By involving people early in the process, you can make them champions for your digital signage system, so be sure to solicit feedback from all stakeholders before, during and after the pilot program.

Some questions to ask yourself at the outset:

- What are you hoping to get out of this evaluation?
- What key features and capabilities do you need to see?
- What content do you want on your displays (schedules, weather, etc.)?
- Will you need to use audio with any screens?
- Who should be involved in the pilot (marketing, IT, HR, etc.)?
- Who is configuring, implementing and maintaining the system?
- Who will be creating, approving and managing content?

Although you may have many individuals or teams involved, someone has to take ownership of the pilot. This may be your IT expert, but will more likely be a communications professional. Remember, this isn't just about the technology, it's about audience engagement.

Whoever leads the project, they'll need to be available throughout the entire pilot to guide people and processes, and monitor feedback.

## 6 Simple Steps



1. Set Your Goals



2. Define the Scope



3. Deploy the Pilot



4. Train Your Team



5. Run the Pilot



6. Assess & Adjust

## Set Your Goals

First, outline the purpose and goals of the pilot. These need to be specific – much more than just “make sure all screens work”.

Some ideas for digital signage pilot goals might be:

- Test all system components on the network
- Configure all third-party applications on the digital signage system
- Ensure all data-mapping connections work
- Choose layouts and layout schedules for all displays
- Define which types of content work best on specific displays
- Assess content creation, management and scheduling processes
- Evaluate teams, and assign user roles and privileges
- Determine effective methods to measure audience engagement

Be sure to clearly relay your goals and specific requests to your digital signage provider, so they can set you up for success. If you add to or change your system in the middle of your pilot, you'll need to extend the pilot run, so you can evaluate the system in its final form.

## Define the Scope

You'll also need to define the parameters of the pilot. If this is more complex than a few screens, you'll want to prioritize the various test environments.

No matter what the scope, make sure your pilot runs in the most real-world setting possible and for as long as you need to thoroughly evaluate it.

The various items you'll need to define are:

- Where the pilot will run
- Timeline for pilot, evaluation and adjustment
- List of action items with task owners and deadlines
- Methods and tools for measuring pilot goals
- Techniques to collect stakeholder feedback
- Project management, tracking and collaboration tools
- Documentation methods and storage
- Budget and resources
- Contingency plans

In addition to the pilot system, you'll want to have a good tool in place to manage tasks and communications with your team during the program. If you have a project management application, such as SharePoint or other collaboration software, this might be a great time to use it.



## Deploy the Pilot

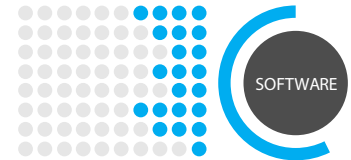
If you're using a system for the first time, you'll need to have a project kick-off call with your digital signage provider to discuss your content management system and media player requirements, and determine if everything will work in your specific network environment.

Consider the following:

- Hardware
- Network
  - Firewalls, ports
  - Security policies
- Necessary Credentials
  - Data Gathering (calendar systems, etc.)
  - Proxy (if required)
  - User Accounts
- Display resolutions
  - Match screens and players

You'll need to work closely with your digital signage provider and IT staff to get your system online. Make sure you have your leading IT specialist or network owner in the implementation session with the digital signage provider, and be sure to allow enough time for the deployment.

If you're running a pilot for a system you already have, you'll want to concentrate more on processes and content, which means launching a specific, measurable campaign in one area of your organization.



## Train Your Team

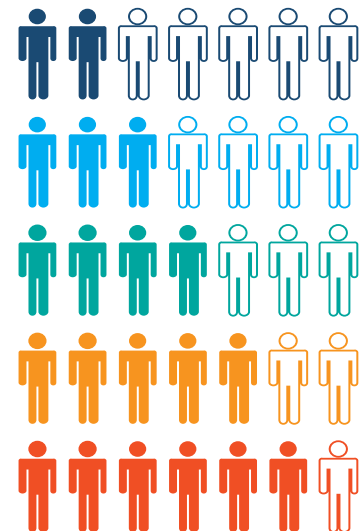
To accurately evaluate your system, you need to know how to use it. Make sure you get some training from your digital signage software vendor, so you can test out all of the features of your content manager.

Some questions to ask before setting up your training sessions:

- Who will need training during the pilot phase?
- What features will you want to be trained on?
- Do you need technical or design training, or both?
- What types of content will you want to use in the future?
- Do you have some real-world content prepared?

Put together a list of all of the types of content you might want to create, import or schedule in your system before your training, so the vendor can provide you with clear guidance. Prepare some real content to load and play with during training, so your experience is as real-world as possible.

You should also have an idea of the number and types of displays, and what you might want your screens to look like, so the trainer can walk you through setting up your layouts.



## Run the Pilot

Be sure to let your pilot run for the allotted time before making adjustments. Again, we recommend less than 30 days for a technical evaluation of system tools, and 60-90 days for engagement techniques to really get the feel for the content and processes.

Obviously, if something technical isn't working, you should fix it right away. But if you change things like workflows or content too often, it will be impossible to evaluate success for a single set of variables.



## Assess and Adjust

When the pilot is over, you'll want to collect data and feedback from all of your stakeholders. You'll see exactly which of your processes and goals succeeded and which need adjustment. This lets you identify where you should make improvements and where you need to bolster resources for a successful digital signage deployment.

If your pilot focuses on audience engagement, consider the following:

- Conduct a survey to determine if viewers were compelled by content
- Did you see higher traffic related to an activity or program?
- Did certain screens contribute to that change in behavior?

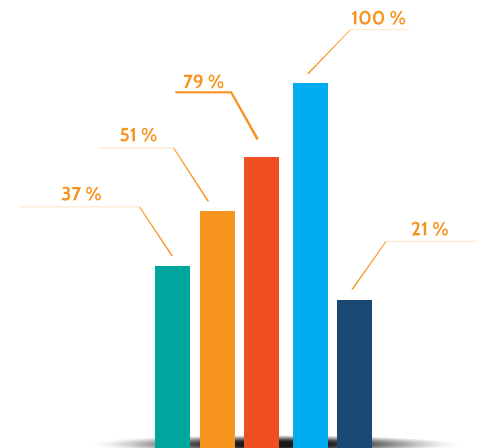
Even though your statistical group can be very small for a pilot, you can still extrapolate the results to predict trends and preferences.

You'll want to organize the results and share them with your digital signage provider. Based on your feedback, they may be able to provide solutions or demonstrate features you didn't know you had.

To evaluate the pilot, you'll want to:

- Collect stakeholder feedback
- Analyze the pilot goals and plan
- Compare actual to predicted performance
- Solve gaps in actual vs. predicted
  - Fix gaps through adjustments in resources or processes
  - Adjust expectations and goals based on results
- Communicate pilot results to vendors and stakeholders
- Decide to continue the pilot or launch across the organization

Keep in mind that a pilot might be a success even if it didn't exactly meet your goals or match your plan. Sometimes, it's easier to pin down objectives and streamline processes after a system has been used in day-to-day operations.



Want to learn more? Contact us at [salesteam@visix.com](mailto:salesteam@visix.com).