C2O Pilot Playbook

Launch your first C2O initiative successfully

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A pragmatic guide to running your first C2O pilot. Start with one outcome, one team, and scale only what works.

Why Pilot First?

Adoption succeeds when it is incremental, evidence-based, and focused on real outcomes. Teams that "flip a switch" on a new model create ceremony overhead without outcome gains. The fix: start small, instrument signals, and scale only practices that measurably improved speed and quality.

Pilot Principles:

- One outcome, one cross-functional team
- Full lifecycle in 6–12 weeks
- Instrument before you ship
- Scale by evidence, not mandate

Pilot Goals

By the end of the pilot, you should have:

1. **Demonstrated value:** Reduced decision latency, fewer escalations, clearer ownership

2. **Living artifacts:** POP + contribution matrix actively referenced in governance

3. **Behavioral evidence:** Collaboration density and CPO metrics trending positive

4. **Playbook practices:** 3–5 reusable practices ready for the next team

Success Criteria

Define these before you start—not after:

Table 1: Metrics Overview

Metric	Target	Measurement
Decision latency	e25% reduction	Time from question raised to decision recorded
Escalation rate	Trending down week-over-week	Count of escalations per week
CPO (Clarity of Purpose & Ownership)	+0.5 on Likert scale	Survey at Week 1 and Week 12
Artifact usage	Referenced in e3 governance meetings	Meeting notes audit
Cycle time	e15% reduction	Time from decision to thin-slice shipped

12-Week Plan

Phase 1: Setup (Weeks 1–2)

Table 2: Week / Focus / Activities

Week	Focus	Activities	Outputs
1	Kickoff	Confirm outcomes; finalize POP; baseline metrics; name Drivers per phase	POP v1, baseline dashboard, Driver assignments
2	Discover	Run discovery workshop; map contributions; set entry/exit criteria	Contribution matrix v1, discovery signals

Week 1 Checklist:

- Outcome defined with 1 lagging + 2–3 leading signals
- Driver named for each phase
- Thresholds published (what triggers escalation)
- POP template completed and shared
- Baseline metrics captured
- Weekly cadence on calendar

Week 2 Checklist:

- Contribution mapping workshop completed
- Roles assigned: Drive, Contribute, Enable, Advise, Inform
- Discovery evidence gathered
- Entry criteria for Decide phase defined

Phase 2: Execute (Weeks 3–6)

Table 3: Week / Focus / Activities

Week	Focus	Activities	Outputs
3	Decide	Prioritize options; set gate criteria; run first advice window	Decision record, gate criteria
4	Build	Execute first sprint; implement validation cadence	Thin slice shipped, cycle time measured
5	Build	Expand contributor engagement; track enable blockers	Collaboration density data
6	Gate	Run Decide'Build gate; review signals; adjust POP if needed	Gate pre-read, decision quality survey

Week 3 Checklist:

- Options presented with trade-offs

- Advice window opened (24–72h SLA)

- Decision recorded with rationale

- Gate criteria for Build defined

Week 4–5 Checklist:

- First thin slice shipped with observability

- Weekly signal review held

- Enable blockers tracked and addressed

- Contributor feedback collected

Source: contribution2outcome.com/kb/foundations/adoption-path

Week 6 Checklist:

- Gate pre-read sent 48h in advance

- Gate meeting held (30–45 min)

- Decision recorded: proceed/iterate/pivot

- POP updated if decision rights changed

Phase 3: Operate (Weeks 7–8)

Table 4: Week / Focus / Activities

Week	Focus	Activities	Outputs
7	Run	Launch operational runbooks; monitor incidents; track MTTR	Runbooks, incident trend
8	Run	Enable support teams; document operational learnings	Enablement completion, support readiness

Week 7–8 Checklist:

- Runbooks published and linked

- Alert routing configured

- Support team enabled

- Incident response tested

- Operational metrics baselined

Phase 4: Adopt & Scale (Weeks 9–12)

Table 5: Week / Focus / Activities

Week	Focus	Activities	Outputs
9	Adopt	Launch change campaign; capture success stories	Adoption signals, champion stories
10	Adopt	Measure value realization; celebrate wins	Value lag measurement, recognition
11	Scale	Identify expansion candidates; draft roadmap	Readiness scores, expansion plan
12	Retrospect	Conduct AAR; lock lessons; share case study	Improvement delta, practices codified

Week 9–10 Checklist:

- Adoption signals tracked (activation, utilization)

- Champion success stories documented

- Value realization measured vs. baseline

- Wins celebrated publicly

Week 11–12 Checklist:

- Expansion candidates assessed for readiness

- AAR (After Action Review) conducted

- 3–5 practices to keep identified

- 1–2 practices to retire identified

- Case study drafted for next team

Weekly Rituals & Artifacts

Required Rituals

Table 6: Ritual / Frequency / Duration

Ritual	Frequency	Duration	Owner	Purpose
Outcome Review	Weekly	30 min	Driver	Review signals, make threshold calls
Enable Council	Bi-weekly	30 min	Enablers	Unblock prerequisites, update SLAs
Advice Window	As needed	24–72h async	Advisors	Provide input on specific questions
Gate Review	At phase transitions	45 min	Driver + Sponsor	Go/no-go decision with evidence

Required Artifacts

Table 7: Artifact / When Updated / Owner

Artifact	When Updated	Owner	Purpose
POP (Pre-emptive Ownership Pact)	Within 24h of decision rights change	Driver	Decision rights and thresholds
Contribution Matrix	At phase transitions	Driver	

Source: contribution2outcome.com/kb/foundations/adoption-path

			Who does what per phase
Decision Log	After each decision	Driver	Options, rationale, follow-ups
Weekly Update	Every Friday	Driver	<200 words: decisions, signals, next steps

Weekly Update Template

```
## [Outcome Name] — Week [N] Update

**Status:** On Track / At Risk / Off Track
**Decision this week:** [Expand/Hold/Iterate] — [DR-ID]

**Signals:**
- [Leading signal]: [current] vs. [target] — [status]
- [Lagging signal]: [current] vs. [baseline] — [status]

**Guardrails:** [All green / Issue: brief description]

**Next week:**
- [Action 1]
- [Action 2]

**Links:** [Dashboard] | [Decision Record] | [Gate Pre-read]
```

Operating Model

Roles by Phase

Table 8: Lifecycle Phase Reference

Phase	Driver	Contributors	Enablers	Advisors
Discover	Product Lead	Research, Engineering	Platform, Data	Security, Legal
Decide	Product Lead	Engineering, Design	Platform	Architecture, Security
Build	Engineering Lead	Product, QA	Platform, DevOps	Security, Privacy
Run	SRE/Ops Lead	Engineering, Support	Platform	Security
Adopt	Product Lead	PMM, Support, Success	Training	Leadership

Advice Window Protocol

1. Driver opens advice window with specific questions

2. Advisors have 24–72 hours to respond

3. Responses use checklists and thresholds, not open-ended opinions

4. Driver closes window and makes decision

5. Decision recorded with rationale

Escalation Thresholds

Define these explicitly at pilot start:

Table 9: Threshold / Trigger / Action

Threshold	Trigger	Action
Green	Signals within target	Driver decides locally; inform stakeholders
Yellow	Signals 10–25% off target	Driver proposes; Sponsor approves
Red	Signals >25% off target OR guardrail violated	Escalate with options and recommendation

Common Failure Modes

Table 10: Anti-Pattern / Symptom / Fix

Anti-Pattern	Symptom	Fix
Big-bang rollout	Ceremonies proliferate without outcome gains	Start with one outcome, one team
No Driver clarity	Decisions drift; escalation by opinion	Name a Driver per phase; publish thresholds
Evidence theater	Data collected but not reviewed at gates	Tie gate decisions to signals; make DR the unit of review
Enabler bottlenecks	Gates stall waiting for approvals	Pave enablement with menus and SLAs; track turnaround
Scope creep	Parallel goals added mid-pilot	Hold the line on one outcome until thin slice ships

Pilot Readiness Checklist

Before Week 1, confirm:

- Sponsor committed to one outcome for 12 weeks

- Cross-functional team identified and available

- Drivers named for each phase

- Thresholds and escalation paths defined

- Baseline metrics accessible

- Weekly cadence protected on calendars

- POP template ready

- Decision log template ready

Scaling After the Pilot

When to Scale

Scale to the next team when:

- Outcome delta is credible (measurable improvement)

- Paved paths exist (templates, intake, office hours)

- 3–5 practices are codified and reusable

- Sponsor commits to a clear outcome for the next team

What to Scale

Scale these (practices that moved outcomes):

- Driver clarity and threshold-based decisions

- Advice windows with SLAs

- Weekly updates with signal links

- Gate pre-reads with options

Don't scale these (common ceremony bloat):

- Extra status meetings

- Duplicate review forums

- Custom templates per team

- Approval chains without thresholds

How to Scale

1. **Select adjacent team** — shared upstream/downstream dependencies

2. **Reuse templates** — paved paths, not bespoke processes

3. **Transfer the habit** — same weekly update format, same decision hygiene

4. **Measure again** — confirm practices work in new context before spreading further

Quick Reference: Signals by Phase

Table 11: Lifecycle Phase Reference

Phase	Leading Signals	Lagging Signals
Discover	Interview count, Problem clarity score	Time to problem statement

Decide	Advice window turnaround, Options considered	Decision latency
Build	Demo frequency, Thin-slice cycle time	Escaped defect rate
Run	Alert-to-resolution time, Checklist coverage	MTTR, Incident count
Adopt	Enablement asset usage, Champion count	Activation rate, Retention

Post-Pilot Review Template

AAR (After Action Review) Agenda

Table 12: Time / Topic / Output

Time	Topic	Output
0–10 min	Outcome review: What did we achieve?	Metrics vs. targets
10–25 min	What worked? (Keep)	3–5 practices to codify
25–40 min	What didn't work? (Stop)	1–2 practices to retire
40–50 min	What should we try next? (Start)	Experiments for next team
50–60 min	Scale plan	Next team, timeline, owner

Questions to Answer

1. Did we hit our success criteria? Why or why not?

2. Which practices actually moved the metrics?

3. Which ceremonies didn't help and should be retired?

4. What would we do differently with a second team?

5. Who should lead the next pilot?

Next Steps After Pilot

1. **Codify learnings** — Document the 3–5 practices that worked in a short playbook

2. **Rotate Drivers** — Seed adoption in new teams by rotating experienced Drivers

3. **Update baselines** — Refresh assessment tool with new benchmarks

4. **Share the story** — Publish a 1-page case study with before/after metrics

5. **Schedule next pilot** — Pick the adjacent team and repeat

Use this playbook with the Adoption Path guide in the C2O Knowledge Base for detailed facilitation scripts and extended case studies.