

Pilot Selection Scorecard

If your healthtech pilots:

- Get strong clinical engagement
- Show measurable outcomes
- Earn glowing testimonials

...but still don't convert to contracts: The problem isn't your product. It's your pilot selection and design.

Most healthtech startups treat pilots as product validation, not sales process. They partner with friendly clinicians who love innovation but can't write checks. Six months later, the pilot "succeeds" but dies in procurement.

This 3-minute scorecard reveals the 6 gaps in your pilot strategy that prevent conversion before you waste another quarter.

Eighteen questions. Three minutes. One honest diagnosis.

Instructions: Answer each question about how you currently select and structure pilots. Each answer has a point value. Add them up at the end.

Q1: Do you have written criteria for your ideal pilot partner?

- Yes, documented criteria we score every opportunity against (5 pts)
- Yes, informal criteria we discuss as a team (3 pts)
- We evaluate case-by-case (1 pt)
- We pursue any interested site (0 pts)

Q2: Do you evaluate whether a pilot success could open doors to similar customers?

- Yes, we document how many similar customers exist (5 pts)
- Yes, we discuss this informally (3 pts)
- Sometimes we consider it (1 pt)
- No, we evaluate pilots individually (0 pts)

Q3: How do you verify the clinical problem aligns with your solution?

- We interview multiple clinicians to validate the problem (5 pts)
- We interview 1-2 clinicians (3 pts)
- Our champion confirms it's important (1 pt)
- We assume alignment if they agree to pilot (0 pts)

Pilot Selection Scorecard

Q4: What level of executive sponsorship do you typically have when starting a pilot?

- C-suite executive (CEO, CFO, COO, CMIO) (5 pts)
- VP-level executive (4 pts)
- Director-level (2 pts)
- Manager or clinical champion (1 pt)
- We don't have executive sponsorship when we start (0 pts)

Q5: How do you verify leadership commitment to digital health?

- We ask for evidence of past purchases and current budget (5 pts)
- We ask if digital health is a priority (3 pts)
- Our champion tells us leadership is supportive (1 pt)
- We don't verify this (0 pts)

Q6: Do you prioritize pilot partners where the champion has bought similar solutions before?

- Always—we qualify for this (5 pts)
- Usually—we ask but don't require it (3 pts)
- Sometimes consider it (1 pt)
- We don't factor this in (0 pts)

Q7: How do you validate that clinicians consider this problem a top priority?

- We ask them to rank their challenges (5 pts)
- We ask directly if it's high priority (3 pts)
- Our champion tells us it's a priority (1 pt)
- We don't validate priority level (0 pts)

Q8: Do you quantify the cost or impact of the problem?

- Yes, we document specific numbers (5 pts)
- Sometimes, when feasible (3 pts)
- We document the problem but not with numbers (1 pt)
- No (0 pts)

Q9: How do you assess clinician willingness to change behavior?

- We ask directly about change readiness (5 pts)
- We observe their current adoption of digital tools (3 pts)
- Our champion assures us they're ready (1 pt)
- We assume willingness if they agree to pilot (0 pts)

Pilot Selection Scorecard

Q10: Do you assess IT's readiness before starting a pilot?

- Yes, we meet with IT and confirm integration is feasible (5 pts)
- Yes, we get verbal confirmation from IT (3 pts)
- Our champion assures us IT will support (1 pt)
- We address IT during the pilot (0 pts)

Q11: Do you review data governance policies for PHI sharing?

- Yes, we review policies and confirm BAA process (5 pts)
- Yes, we ask about policies (3 pts)
- We address this when it comes up (1 pt)
- We don't review upfront (0 pts)

Q12: When do you engage technical decision-makers?

- Before pilot agreement is signed (5 pts)
- During pilot design phase (3 pts)
- After pilot starts (1 pt)
- Only if technical issues arise (0 pts)

Q13: Do you identify the reimbursement or value-based care connection?

- Yes, we document the financial path (5 pts)
- Yes, we identify likely paths (3 pts)
- We focus on clinical outcomes first (1 pt)
- We don't assess this upfront (0 pts)

Q14: How do you verify finance has quantified the problem cost?

- We meet with finance and confirm they've calculated costs (5 pts)
- We ask our champion if finance has quantified it (3 pts)
- We help them quantify during the pilot (2 pts)
- We don't verify this (0 pts)

Q15: How do you confirm budget availability?

- We get written or verbal confirmation from the budget holder (5 pts)
- Our champion says budget should be available (3 pts)
- We plan to build the business case during pilot (1 pt)
- We don't discuss budget before pilot (0 pts)

Pilot Selection Scorecard

Q16: When do you engage procurement?

- Before pilot starts (5 pts)
- During pilot (3 pts)
- After pilot completes (1 pt)
- Only when they reach out to us (0 pts)

Q17: Do you assess legal and compliance requirements before starting?

- Yes, we review requirements upfront (5 pts)
- We ask our champion about typical requirements (3 pts)
- We address legal issues as they arise (1 pt)
- We don't assess requirements upfront (0 pts)

Q18: Do you establish how decisions will be made after the pilot?

- Yes, we document the decision process in writing (5 pts)
- Yes, we discuss this verbally (3 pts)
- We assume it will be obvious (1 pt)
- No (0 pts)

TOTAL SCORE: ___ / 90

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How to Use This Rubric

This scorecard has 18 questions worth 0-5 points each (max 90 points total).

Score Range	Label	What This Means
0-35	Pilot Roulette	You're picking pilots based on enthusiasm, not conversion potential. Most will fail.
36-52	Inconsistent Process	Some pilots convert, others stall. You're learning but not systematically de-risking.
53-70	Conversion-Ready	Your pilot process is designed to convert. You're running deals disguised as pilots.
71-90	Pilot Machine	Your pilot qualification rivals enterprise sales best practices.

Most founders score 42-48 on their first attempt.

Scored under 53?

Book a free 30-minute Pilot Strategy Audit and we'll show you:

- The 3 gaps in your qualification process that kill conversion
- How to redesign your pilot structure to force buying decisions
- Which current opportunities to walk away from

[Audit My Pilot Strategy →](#)

Scored 53+?

You're ahead of most startups. Book a Pilot Scale Session to turn your strong process into a repeatable revenue engine.

[Scale My Pilots →](#)