

# Pilot, refinement and embedding



This section describes how the dashboard was tested, refined and embedded into practice through iterative feedback and stakeholder engagement. It highlights the structured approach to piloting, the importance of feedback loops and the strategies used to embed the tool across the system.

## Testing approach

The initial testing phase focused on validating functionality and building trust with key stakeholders before wider rollout. Further testing for subsequent versions has followed the same process.

- **Version one testing** – in June 2024, version one pilots were carried out with the People Story Committee. This involved a live demonstration of the platform, highlighting key features and functionality and inviting in-person feedback. This stage of the testing process was highlighted as being extremely useful, as many committee members have workforce planning backgrounds in health or social care environments and provided insight that shaped the development of the dashboard.
- **Secondary testing** – additional testing of version one was done with other stakeholders who were not part of the committee, both through demonstration and invitation to access the dashboard.
- **Versions two, three and four testing** – testing of subsequent versions has followed the same approach due to the effectiveness of the initial testing process. Version releases are now accompanied by emails containing update details and patch notes for those unable to attend demo workshops.



# Feedback and iteration

Feedback was central to shaping the dashboard, ensuring it evolved from an interesting concept into a practical, actionable tool.

- **Impact of demo workshops** – hands-on demo sessions, including the initial live demonstration tests, to both health and adult social care partners, drove major improvements in usability, granularity and transparency, ensuring the dashboard delivered actionable insights.
- **Granularity improvements** – critical feedback identified the limited insight of data capped at local authority level as a major flaw. This led to the adoption of LSOA-level data as described in the digital building block.
- **Built-in feedback mechanism** – embedded a feedback form and bug report feature into the dashboard for immediate user input.

# Embedding practices

Embedding the dashboard into routine planning required continuous engagement, training resources and iterative updates to maintain relevance and usability.

- **Live demonstrations** – in-person or online demonstrations to any interested party became standard practice, ensuring users were confident and promoting the tool through word-of-mouth support.
- **User guide distribution** – shared a PDF user guide to provide simple instructions that could be retained and shared.
- **Ongoing communication** – email updates for version changes and plans for video tutorials in the future to enhance accessibility.





## Key decisions

- Prioritised in-person engagement and used live demos and workshops as the primary feedback mechanism rather than relying solely on digital forms.
- Adopted phased roll outs of versions with new features with clear communication (emails, patch notes) to keep users informed and engaged.
- Incorporated feedback mechanisms directly into the dashboard for ongoing improvement.





## Key learnings

- In-person demos generated richer feedback than passive channels.
- Regular updates and clear instructions helped promote adoption.
- Offering demos and user guides ensured users felt supported and promoted wider uptake.

**“User feedback has been crucial to the People Story Dashboard development and user engagement. One of the most pivotal feedback sessions was when we did an in-person workshop. We had a full-day session where we got a representatives from multiple sectors to see the People Story Dashboard and discuss how it can be used and what development was needed.”**

**Andrew Barker**, Strategic Workforce Planner, Humber and North Yorkshire ICB