

Plan a POLT pilot

Use a small, agreed workflow to assess whether POLT fits the people who enter, retrieve, and review your operational records.

Start with

One workflow and a named utility sponsor

Demo data

Fictional assets, events, and counterparties

Pilot terms

Scope, timing, and cost agreed separately

01 A practical first meeting

Invite an operations lead and one or two people who regularly enter or retrieve logs. Use a 20-minute conversation to review the current workflow, walk through an example in POLT, and identify what must be demonstrated next.

Understand the task. Identify the record being created, the information required, the frequency of updates, and who uses it at handoff.

Demonstrate the full path. Create, update, retrieve, and review the history of one fictional record. Include the output needed by the next person.

Choose the next decision. Determine whether the workflow fits well enough for a defined evaluation and identify the utility sponsor and IT/security contact.

02 Agree the scope before creating accounts

A possible starting point is one workflow, three to five evaluators, and two to four weeks. These are discussion examples, not a fixed package or commitment. Confirm the scope and commercial terms together.

People and responsibilities. Name the utility sponsor, participating users, administrator, IT/security reviewer, and POLT contact.

Environment and data. Identify the approved environment, permitted data, account controls, retention period, and what happens to records after the evaluation.

Timing and support. Set start/end dates, meeting cadence, support hours, escalation contacts, and any fee or procurement requirements.

03 Measure entry, retrieval, and handoff

Record a baseline with the existing process, then repeat the same agreed tasks in POLT. Set acceptance targets with the utility before starting.

Entry time. Time a representative log from opening the form to confirming the saved record. Check completeness as well as speed.

Retrieval and handoff. Ask a second user to find a specific record, identify the latest revision, and prepare the agreed handoff output.

History and collaboration. Confirm that a schedule change retains its original value and attribution, and that two users cannot silently overwrite each other's edits.

User fit. Record confusing labels, missing fields, accessibility needs, and support requests. Separate must-have changes from preferences.

04 Keep the evaluation's operating boundaries explicit

Use fictional records for the first demonstration. Actual utility data requires the organization's approval of hosting, access, and data handling. Agree which existing system remains the official record and how any parallel entries will be reconciled.

POLT records and presents information. Operators continue to use approved procedures and systems for coordination, outage approval, dispatch, trade execution, and equipment control. The evaluation does not establish regulatory compliance or approval for operational reliance.

Review the security overview together, including application MFA/SSO, backups, retention, incident handling, and the support arrangements needed for the proposed scope.

05 Decide whether to continue and plan how to close the pilot

- 1. Review results.** Compare the agreed measures, user feedback, incidents, and unresolved requirements.
- 2. Choose a next step.** Proceed to procurement, extend for specific questions, or close the evaluation.
- 3. Close access and data.** Export the agreed records and history, remove access that is no longer needed, and carry out the agreed retention or deletion process.

To discuss a demo or evaluation, contact Justin at justin@polt.systems. Pilot price, support commitments, data terms, and any production agreement are established separately.

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