

PRACTICAL BRIEF

Before You Scale

Six questions for evaluating workplace technology

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PURPOSE

A pilot should reduce uncertainty, not merely demonstrate that a tool can be switched on. This brief combines the Forum's workplace-adaptation framework with established human-centred design, AI risk-management, privacy and ergonomics principles.

UNDERSTAND → DEFINE → BASELINE → TEST → LEARN → DECIDE → SHARE

The six questions

01 What constraint are we actually trying to solve?

Write the problem in operational terms before selecting a product. Separate headcount, skill, retention, workflow, technology, workplace conditions and management capability.

02 Where is scarce capacity being consumed?

Map waiting, hand-offs, duplicate entry, rework, administrative burden, unnecessary physical demand and decisions that consume scarce expertise. Start from actual work, not the vendor feature list.

03 Which tasks or workflows should change?

Work below the job-title level. Map what happens before, during and after the task. Involve the people doing the work. Identify safety-critical steps and points where human judgment must remain central.

04 What conditions are required before implementation?

Check data quality, privacy, worker and manager training, governance, technical integration, equipment, vendor support, participation, change capacity and the ability to interpret results.

05 What should be measured before scaling?

Establish a baseline. Select a small set of outcome measures tied to the problem — time, quality, output, burden, exposure, error, retention, safety, user experience or another defined result. Add implementation measures separately.

06 What did the intervention teach us?

End with a decision: scale, adapt, stop or investigate further. Record unintended effects and conditions that may limit transfer to other tasks, sites or worker groups.

Why this sequence is defensible

ISO 6385 treats work systems as combinations of people, equipment, environment and work organization and calls for human, social and technical requirements to be considered together. ISO 9241-210 sets out an iterative human-centred design process, while ISO 9241-220 addresses the organizational processes needed to enable and assess it. NIST’s AI Risk Management Framework similarly emphasizes evaluation in context rather than trust based on technical claims alone.

For technologies that collect or infer information about workers, privacy belongs upstream. Canadian privacy authorities recommend that employee monitoring be specific, necessary, proportionate and minimally intrusive, with a privacy impact assessment and human oversight where AI contributes to consequential employment decisions.

A pilot record

Problem	What workplace constraint are we trying to change?
Context	Which workers, tasks, site conditions and operating constraints matter?
Baseline	What happens now, and what evidence establishes it?
Intervention	What exactly will change — and what will not?
Measures	Which 2–5 outcome measures and implementation measures will be tracked?
Safeguards	What privacy, safety, governance and human-oversight conditions apply?
Decision rule	What result would justify scaling, adapting, stopping or further investigation?
Learning	What unintended effects and transfer conditions should be documented?

MEASUREMENT RULE

Do not confuse implementation with outcome. Licences, training, usage and pilot completion show that activity occurred. The decision question is whether the defined workplace condition changed, by how much, for whom, under what conditions — and whether the intervention created new burden or risk elsewhere.

Safety and human performance

Technology and redesign can alter pace, posture, force, repetition, information load, autonomy, coordination and decision quality. NIOSH ergonomics guidance recommends understanding work processes, tasks, equipment and workplace layout before selecting controls, and evaluating interventions after implementation. ISO 10075-2:2024 similarly treats mental workload, health, safety, well-being, performance and effectiveness as design considerations in work systems that can include robotics and intelligent autonomous systems.

When the technology uses AI

Add three checks: (1) validate the system in the actual use context rather than relying only on vendor benchmarks; (2) define where human review and override are required; and (3) document data, privacy, error and bias risks that could affect workers or decisions. For consequential employment uses, Canadian privacy regulators explicitly recommend a human in the loop.

BOTTOM LINE

A good pilot is a structured learning exercise. Define the problem first, establish the baseline before implementation, test in context, measure outcomes and make an explicit decision. The technology is one component of the work system — not the objective in itself.

Sources and evidence notes

1. ISO 6385:2016, [Ergonomics principles in the design of work systems](#). Integrated human-social-technical work-system design.
 2. ISO 9241-210:2019, [Human-centred design for interactive systems](#).
 3. ISO 9241-220:2019, [Processes for enabling, executing and assessing human-centred design within organizations](#).
 4. ISO 10075-2:2024, [Ergonomic principles related to mental workload](#). Work-system design covering mental workload, health, safety and performance.
 5. NIST, [AI Risk Management Framework](#). AI risk management and evaluation in context.
 6. Federal, provincial and territorial privacy commissioners, [Protecting Employee Privacy in the Modern Workplace](#).
 7. NIOSH, [Elements of Ergonomics Programs](#). Task analysis, worker involvement, control selection and evaluation.
 8. ILO, [Generative AI and Jobs: A 2025 Update](#). Task-level transformation and the importance of human input and social dialogue.
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EVIDENCE STANDARD

Official statistical and regulatory sources are used for core factual claims where available. Survey, think-tank, consulting and international evidence is used as complementary context and is identified by source type. Descriptive associations are not presented as causal effects, and measures with different populations, definitions or reference periods are not treated as directly comparable.

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