



Deploy

From Presales to Go-Live

Deployment Playbook 3 of 4 — Beacon Health Limited

A deployment that has been properly planned does not feel like an event, it feels like a natural progression. Equipment arrives expected. Operators know exactly what to do. Participants feel informed and at ease. The first screening session runs without improvisation. When Deploy is done well, go-live is not a moment of anxiety but a moment of confidence. It's the culmination of everything that Curate and Orchestrate have put in place. This playbook sets out exactly how Beacon Health gets every deployment to that point.

PRESALES AND SCOPING

Deployment begins before any contract is signed. Beacon Health's presales process is a structured scoping exercise; designed to ensure that every program we commit to is feasible, appropriately resourced, and genuinely aligned with the deploying organisation's objectives.

- **Initial needs assessment.** We conduct a structured conversation with the deploying organisation covering program objectives, target population, deployment environment, volume expectations, timeline, and budget parameters, establishing whether hPOD is the right fit before any proposal is developed.
- **Program design consultation.** Based on the needs assessment, we develop a proposed program design, covering screening modalities, deployment model, site configuration, staffing requirements, data governance approach, and reporting structure.
- **Deployment model selection.** We work with the organisation to select the most appropriate commercial model; Screening-as-a-Service, Purchase with Managed Services, or Lease which is based on their operational preferences, budget structure, and long-term program intent.
- **Scope of work documentation.** We produce a detailed scope of work covering every deliverable, timeline, responsibility, and success metric, creating a shared reference that governs the deployment from contract through to go-live.
- **Regulatory and compliance pre-check.** Before finalising the scope, we conduct a preliminary regulatory assessment; confirming that the proposed deployment is compliant with applicable medical device, data protection, and operational requirements in the target geography.
- **Commercial agreement and program initiation.** Once scope is agreed, the commercial agreement is executed, and the program is formally initiated. Triggering the handover from presales to the deployment team and the commencement of site assessment.

SITE ASSESSMENT AND READINESS

No two deployment sites are identical. Beacon Health conducts a structured site assessment at every location before any equipment is shipped; ensuring that the physical, technical, and operational environment is ready to support a successful screening program.

- **Physical site survey.** We assess available space, traffic flow, privacy requirements, lighting, ventilation, and accessibility to confirm that the site can accommodate hPOD and the participant experience it is designed to deliver.
- **Infrastructure and connectivity assessment.** We assess power supply, internet connectivity, network security, and any IT integration requirements to identify gaps that need to be resolved before installation begins.



- **Logistics and access planning.** We confirm delivery access, installation scheduling, equipment storage arrangements, and on-site support contacts to ensure that installation day runs without logistical friction.
- **Site readiness checklist completion.** Every site must pass a formal readiness checklist before equipment is shipped. Items that do not meet the standard are documented with a remediation plan and owner before the installation date is confirmed.
- **Local liaison and stakeholder briefing.** We brief the relevant site stakeholders; facilities managers, HR leads, health and safety officers, and reception teams on what is being installed, what the screening program involves, and what their role is during and after installation.
- **Site acceptance criteria definition.** We agree in advance the criteria that define a successful installation; covering device function, connectivity, workflow, privacy, and participant experience so that site acceptance is an objective assessment rather than a subjective one.

Device Installation, Configuration and Operator Training

DEVICE INSTALLATION AND CONFIGURATION

hPOD installation is a structured, documented process; not a plug-and-play event. Every device is installed, configured, tested, and formally accepted before it is cleared for participant use.

- **Pre-shipment device preparation.** Every hPOD unit is prepared, configured, and tested at the point of dispatch, ensuring that the device arriving on site is pre-loaded with the correct program configuration, screening protocols, and data governance settings.
- **On-site installation.** Installation is conducted by a qualified technician following a documented installation procedure covering physical setup, power connection, network integration, peripheral attachment, and system initialisation.
- **Program configuration verification.** Following installation, we verify that the device is configured correctly for the specific program; screening modalities enabled, consent workflows active, data flows connected, and reporting integrations functioning.
- **End-to-end system test.** We conduct a full end-to-end test of every data flow from device capture through AI processing, individual result delivery, clinical escalation trigger, and organisational portal update before the device is cleared for use.
- **Snag and remediation process.** Any issues identified during testing are logged, prioritised, and resolved before site acceptance is granted. No device is cleared for participant use with an open technical snag.
- **Site acceptance sign-off.** Formal site acceptance is documented and signed off by both Beacon Health and the deploying organisation confirming that the device, environment, and data flows meet the agreed acceptance criteria.

OPERATOR TRAINING AND CERTIFICATION

Every operator who runs a Beacon Health screening session must be trained, assessed, and confirmed competent before they work with participants independently. Training is not optional and is not abbreviated for convenience.

- **Operator role definition.** Before training begins, we confirm the specific operator profile for the deployment their existing skill level, their role in the screening workflow, and the boundaries of their authority within the program.
- **Structured training program.** We deliver a structured training program covering device operation, screening workflow, participant interaction, consent process, result handling, escalation protocols, and data governance obligations.
- **Hands-on practice sessions.** Training includes supervised hands-on practice. Operators run simulated screening sessions with feedback before they are assessed for certification.



- **Competency assessment.** Each operator completes a formal competency assessment before being cleared for independent operation covering both practical device operation and the procedural and governance requirements of the program.
- **Operator reference materials.** Every operator receives a concise reference guide covering the key steps, escalation contacts, and common troubleshooting procedures available at the screening station during every session.
- **Ongoing support access.** Certified operators have access to a defined support channel for questions, issues, and escalations arising during live screening sessions ensuring that help is available when it is needed, not only during training.

Participant Onboarding, Go-Live and Handover

PARTICIPANT COMMUNICATION AND ONBOARDING

Participant experience begins long before they arrive at the screening station. Beacon Health designs the full participant communication journey from first awareness through to arrival to ensure that every participant arrives informed, consented, and at ease.

- **Awareness and invitation communications.** We design the initial participant communications; email, SMS, poster, or in-person briefing depending on the deployment context covering what the screening program is, why the organisation is offering it, what it involves, and how to participate.
- **Pre-screening information pack.** We develop a participant information document covering what will be measured, how results will be delivered, how data will be handled, what happens if a result is flagged, and how to withdraw consent in plain language appropriate for the target population.
- **Consent process design.** We design the consent workflow, digital or paper depending on the deployment context ensuring that every participant provides informed, explicit consent before any screening takes place.
- **Scheduling and logistics communication.** We design the scheduling process and participant logistics communications covering how to book, what to bring, how long it takes, and what to expect on the day.
- **Cultural and language adaptation.** Where the participant population includes non-English speakers or requires cultural adaptation, we work with local ecosystem partners to adapt communications ensuring that language and cultural barriers do not become participation barriers.
- **Participant feedback mechanism.** We establish a simple, accessible mechanism for participants to provide feedback on their experience capturing insights that can improve the program in real time and inform future deployments.

GO-LIVE EXECUTION AND FIRST-DAY PROTOCOLS

Go-live day is not the beginning of the program, it is the confirmation that everything planned and prepared has been done correctly. Beacon Health's first-day protocols ensure that the transition from preparation to live operation is smooth, monitored, and supported.

- **Go-live readiness confirmation.** On the morning of go-live, we conduct a final readiness check confirming device function, operator presence, participant scheduling, connectivity, and escalation contacts before the first participant is invited to screen.
- **Beacon Health on-site support.** A Beacon Health representative or designated support contact is available on-site or remotely for the first screening session; ready to respond to operational questions, technical issues, or participant concerns in real time.
- **First session monitoring.** We monitor the first screening session actively tracking participant flow, device performance, data transmission, and operator confidence and provide immediate feedback and support where needed.



- **Real-time issue logging.** Any issues arising during the first session are logged in real time; categorised by severity, assigned to an owner, and actioned within agreed timeframes ensuring that nothing is carried forward unresolved.
- **End-of-day debrief.** At the close of the first day, we conduct a structured debrief with the site operator and deploying organisation contact; reviewing what went well, what needs adjustment, and any actions required before the next session.
- **Post-go-live stabilisation period.** We define a structured stabilisation period following go-live, typically the first two to four weeks during which Beacon Health maintains elevated monitoring and support before transitioning to standard Operate-phase service levels.

HANDOVER TO OPERATE

Deploy is complete when the program is running stably, the deploying organisation is confident, and the Operate phase can begin without dependency on deployment-level support. Handover is a structured, documented transition, not a withdrawal.

- **Stabilisation criteria confirmation.** Before handover is initiated, we confirm that the program has met the agreed stabilisation criteria covering device uptime, participant throughput, data flow integrity, operator confidence, and clinical escalation function.
- **Operate-phase service level agreement.** We confirm the service levels, support channels, escalation protocols, and reporting cadence that will govern the Operate phase ensuring the deploying organisation knows exactly what ongoing support looks like.
- **Handover documentation package.** We prepare and transfer a complete handover documentation package covering program configuration, site acceptance records, operator certifications, open issues log, risk register, and the first program performance report.
- **Deploying organisation readiness confirmation.** We conduct a formal readiness review with the deploying organisation confirming that their nominated program contact, governance structure, and internal escalation process are in place and functioning.
- **Formal handover sign-off.** Handover is documented and signed off by both Beacon Health and the deploying organisation; confirming that the program is stable, the Operate phase has commenced, and Deploy-phase support has formally concluded.
- **Lessons learned capture.** We conduct an internal lessons learned review at the close of every deployment; capturing what worked, what could be improved, and any insights that should inform future program design, site assessment, or operator training.

Previous: *Orchestrate — Turning a Curated Ecosystem into a Structured Program* **Next:** *Operate — Managed Operations and Service Support*