

New Software Rollout / Implementation Checklist

Steps for actually rolling out a new tool company-wide, so adoption doesn't quietly fail.

Before Purchase

- ☐ The actual problem this tool solves is clearly defined
- ☐ Key stakeholders who'll use it were involved in evaluation
- ☐ Data migration or integration needs identified upfront

Setup

- ☐ Configuration matches how your business actually works
- ☐ Permissions and access set up deliberately
- ☐ Test data used before rolling out to real, live business data

Training

- ☐ Training scheduled before go-live
- ☐ Different training for different user types if needed
- ☐ A quick-reference guide created for common tasks

Go-Live

- ☐ A specific go-live date communicated clearly in advance
- ☐ Old system/process retired on a clear timeline
- ☐ Support available during the first weeks

Post-Launch

- ☐ Usage checked after 30 days
- ☐ Feedback gathered from users
- ☐ Follow-up training offered if adoption is lagging

Common Rollout Failures To Avoid

- ☐ Buying the tool before defining the actual problem
- ☐ Skipping training because "it's intuitive"
- ☐ No one owning the rollout, so it stalls after initial setup