Ready for Launch?

Implementing new software can be a difficult process. Follow this checklist to help your team learn to love your new software right out of the gate!

1. Assessment

- [ ] **Enlist Executive Support**
  There's going to be pushback. The best you can do is make sure the executive team fully supports this transition.
- [ ] **Form a Committee**
  Assemble a stakeholder from each functional group who will be using the software for your implementation committee.
- [ ] **Set a Launch Date**
  Plan at least 3 months to get everything (and everyone) ready for launch.

2. Configuration

- [ ] **System Setup**
  Begin setting up the system to prepare for data load. Train committee members.
- [ ] **Gather Your Data**
  Determine what data you do and do not want to move (cleanup).
- [ ] **Begin Data Conversion**
  Pay for data load, or reformat data to match the new system.
- [ ] **Add Partner Integrations**
  Inform partners of launch data and work with them to prepare for launch.

3. On-Boarding

- [ ] **Setup User Accounts**
  Define user role security measures and add users to the system.
- [ ] **Software Training**
  Provide multiple methods of training. Make it mandatory. Set an as-of date.
- [ ] **Run Concurrent Systems**
  Run one to 2 complete cycles with both systems to acclimate users and iron out any kinks. (Also good as OTJ training!)

4. Launch Day!

- [ ] **Stay Calm**
  Things will go wrong. But you are ready.
- [ ] **Automation & Customization**
  Give users a day or two to 'play', setting up automations and making it their own.
- [ ] **Support**
  Provide a support policy so users have a path to get help if things go sideways.
- [ ] **Feedback**
  Share feedback with the software provider to enhance your experience.