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INTRODUCING SOFTWARE CHECKLIST

You could face various challenges when introducing new technology into your business. Use this checklist to make sure that getting buy-in from your team isn't one of them.

1. Understand your team	
Who in the team will new software affect?	
Will it have a positive impact on their day-to-day work?	
Is there anyone in the team who may find it challenging? If so, will they need further training or support?	

2. Prepare your message	
Think about how you'll showcase the new software to the team. *For example, highlight its advantages and why there was a need for change.*	
Will the new software make tasks faster for the team? .	
Does it allow for the option to work remotely, and collaborate better across various locations?	

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2. Prepare your message *(continued)*

How will you announce the software?

For example, do you have a plan for how you'll communicate with your team ahead of launch day?

Explain any challenges the company could face when implementing the new software and how you'll overcome them.

Will anyone outside the business, such as suppliers or customers, be affected by the new system?

If so, make sure you or your team contact them ahead of the new software going live.

3. Schedule training

Who needs to be trained on the new system?

Will there be different levels of training depending on each team member's level of expertise?

Are there people in your team who have used the technology before who can help train colleagues?

Will training be classroom-based or online?

Who will carry out the training – external specialists or someone within the business?

For example, can your software supplier support training?

How long will training take? Will it be ongoing?

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4. Implementing your new software – and integrating it (if you have existing systems)

Who is implementing the new software?	
How will you move data from your existing system to the new technology? *Will you be able to do this yourself or will you want external support?*	
How will you check that everything has migrated over correctly?	
Do you have a plan to integrate the software with other products? *If so, include time for testing. And keep the option of reverting to old systems if there are issues with integrating new software that need fixing.*	
Are there parts of your business you want to remain the same and not be affected by the new technology? *If so, how would this work in practice?*	
How much time and what resources do you need to make sure are available? *For example, what resource have you got available to support your team in adopting the new tech?*	
Who do you need to include to test the new software thoroughly before introducing it to the rest of the team? *This could include a general test of features, checks to ensure it meets security standards, and user testing.*	

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5. Going live	
Test the new software during a quiet period and try to make sure it's working as it should before you go back into a busier time.	
Be prepared for business as usual to take longer for the foreseeable future. *Make sure that your team are aware of this, so they can factor it into client communications and delivery deadlines.*	
Ensure support services for your new software are fully available and accessible for anyone in your team who need it.	

Once the new technology is in place, integrated with other systems you may have, and your team have fully adopted it – it's time to review it. With the software implemented, you'll need to assess whether it's achieving everything you wanted it to.

Find out more in the final step of our 6-part series of guides Get your money's worth.

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