



Change Management 101: Rolling out a New Tool

Checklist

Adopting new tools and technologies can be a game-changer, but the rollout of a new tool can make-or-break the system's success.

Without user buy-in, even the most innovative tools fall short of their potential.

This checklist is designed to help you drive user adoption effectively to ensure a smooth transition and maximize the value of your investments.

Before you begin

1 Engage Users Early

- ☐ Identify key stakeholders including department heads, team leaders, and end users.
- ☐ Gather requirements and understand pain points to influence system design or tool selection.
- ☐ Ask value-based questions to quantify the business impact and document findings in a business requirement document.

2 Set Clear Goals & Metrics

- ☐ Define realistic targets for utilization (e.g., 50-70% adoption as an initial benchmark).
- ☐ Determine key success metrics such as usage frequency, satisfaction rates, and ROI indicators.
- ☐ Leverage early adopters as champions to foster a coaching culture for non-adopters.

3 Identify your eager adopters

- ☐ Segment users into adopters, skeptics, and resisters to tailor ongoing engagement strategies.
- ☐ Develop a plan that speaks to the benefits for all three groups.

During the rollout

1 Communicate Transparently

- ☐ Regularly update users on the implementation status, provide timelines, and address concerns.
- ☐ Utilize varied communication mediums such as videos, demos, and hands-on training to engage diverse audiences.

2 Reward and Recognize

- ☐ Incentivize users with small rewards like public recognition, gift cards, or time off for meeting milestones.
- ☐ Celebrate wins at team meetings or through newsletters to maintain momentum and encourage others.

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During the rollout (cont)

3 Provide Comprehensive Training and Support

- ☐ Roll out role-specific training sessions and practical scenarios to enhance relevance.
- ☐ Offer a mix of live workshops, video tutorials, and written manuals to cater to different learning styles.
- ☐ Host ongoing "Ask Me Anything" sessions post-launch to build confidence and troubleshoot issues.

4 Lead By Example

- ☐ Ensure managers and executives actively use the new tool and advocate for its benefits.
- ☐ Share success stories from all levels of the org to demonstrate the tool's impact on organizational goals.

Long-term adoption

1 Reward and Recognize

- ☐ Don't discontinue your efforts to recognize adopters over time. These eager adopters will become your champions.

2 Stay Realistic and Persistent

- ☐ Recognize that complete adoption is unlikely and focus on steady improvement.
- ☐ Build a culture of learning and adaptation to sustain long-term commitment.

3 Track and Adapt

- ☐ Continuously monitor metrics to identify and address barriers to adoption.
- ☐ Gather feedback and enhancement requests for continuous improvement.

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