YOUR GUIDE TO CONFIDENT TECH ADOPTION

BY: ABSTRAKT

Use this checklist to assess your organization's preparedness for adopting new technology and to guide a successful implementation process.

1 PRE-ADOPTION READINESS

DEFINE OBJECTIVES

- [ ] Clearly define specific, measurable goals for the new technology (ex: reduce average handle time by 20%, improve first-call resolution by 15%).

  Be realistic with time to achieve these metrics - 6 months to 1 year

- [ ] Outline what success looks like for each relevant department (Operations, IT, QA, Compliance)

STAKEHOLDER ENGAGEMENT & REQUIREMENTS

- [ ] Consult end-users and department leaders during the evaluation phase.
- [ ] Gather input on current pain points and potential barriers to adoption.
- [ ] Document required features versus optional enhancements.

PLAN FOR RISK AND COMPLIANCE REQUIREMENTS

- [ ] Conduct a Data Protection Impact Assessment (DPIA) if handling personal data or sensitive information.
- [ ] Ensure vendor compliance with industry standards (ex: SOC 2, HIPAA, PCI DSS).
- [ ] Review data security terms, including ownership, storage, access controls, and deletion protocols.

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② VENDOR EVALUATION

EVALUATE TOTAL COST OF OWNERSHIP (TCO)

- [ ] Assess the full TCO by breaking down all associated expenses:
  - Upfront costs *(hardware, software licensing, installation)*
  - Ongoing licensing and subscription fees
  - Maintenance and support costs
  - Training and onboarding expenses
  - Potential downtime during implementation and updates

REVIEW VENDOR CAPABILITIES

- [ ] Request case studies or references from existing customers. Understand how long it will take to see an ROI from the new technology.
- [ ] Understand if the vendor's product is configurable or customizable. Configurable is plug and play, easy for you to change. Customizable requires the vendor to make the changes and could take weeks to complete.
- [ ] Review the vendor’s financial health and growth trajectory. Ask for their product roadmap and how customer feedback is integrated.

ASSESS INTEGRATION CAPABILITIES

- [ ] Confirm the solution integrates smoothly with existing systems (ex: CRM, telephony, case management).
- [ ] Plan for potential integration obstacles.
- [ ] Ask if you can see how the current integration works during the demo.
- [ ] Discuss the computers your team uses, firewalls, internet speed/capabilities, and anything else that may affect the use of the new technology.

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2 VENDOR EVALUATION CONTINUED...

USER EXPERIENCE AND ACCESSIBILITY

- [ ] Evaluate the ease of use of the interface. Can your end-users navigate without heavy training?
- [ ] Ensure accessibility for end-users with diverse tech skills and/or disabilities.
- [ ] Ask to preview or test the interface with live user roles or walkthroughs.

EXIT STRATEGY AND CONTRACT TERMS

- [ ] Review cancellation policies, auto-renewal clauses, and migration support.
- [ ] Determine who owns your data and what happens if you end the relationship.
- [ ] Confirm documentation of processes and system access is stored internally to avoid vendor lock-in.

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3 IMPLEMENTATION PLANNING

FORM A CROSS-FUNCTIONAL IMPLEMENTATION TEAM

- [ ] Assign clear ownership for project management, training, communication, and change management.
- [ ] Determine who your champion/leader is for this implementation.
- [ ] Include people from IT, Operations, QA, and end-user groups, but ultimately it should be one person's responsibility, so they take ownership.

DEVELOP AN IMPLEMENTATION TIMELINE

- [ ] Create a phased rollout plan among the different teams with key milestones.
- [ ] Ask the vendor to create a timeline for you based on their most successful implementations.
- [ ] Establish contingency plans for delays or integration issues.

VENDOR INVOLVEMENT

- [ ] Understand how much the vendor is involved during implementation.
- [ ] Do they charge additional for this or are there set hours your team is limited to?

INTERNAL COMMUNICATION PLAN

- [ ] Craft messaging to explain the purpose of the new technology and the value it brings.
- [ ] Involve leadership in promoting the project to build internal trust.
- [ ] Plan a kickoff session, internal FAQ, or early-access preview for change champions.

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4 TRAINING & CHANGE MANAGEMENT

DEVELOP A TRAINING PLAN

- [ ] Create tailored training programs based on the different teams using the product.
- [ ] Schedule training sessions before, during, and after rollout. **FYI**: Your vendor should lead these initially until your training supervisor is ready to take the reins.

PLAN FOR USER SUPPORT AND FEEDBACK

- [ ] Offer ongoing user support and refresher sessions.
- [ ] Understand how involved the vendor is at this point and any associated costs.
- [ ] Establish feedback loops to capture early user concerns and suggestions.

5 POST-LAUNCH OPTIMIZATION

MONITOR ADOPTION AND PERFORMANCE

- [ ] Identify KPIs to track adoption and effectiveness. This should be done alongside your vendor. Establish these upfront.
- [ ] Review usage metrics regularly and share with internal teams and vendors.
- [ ] Share wins early to increase adoption across teams.

CONTINUOUS IMPROVEMENT

- [ ] Schedule post-launch reviews *(ex: 30, 60, 90 days)* with supervisors and vendor.
- [ ] Adjust processes or retrain based on adoption trends amongst roll-out teams.
- [ ] Continue to align vendor support with long-term goals and product usage insights.

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6 COMMON PITFALLS TO AVOID

- [ ] Undefined objectives and unclear success metrics
- [ ] Lack of stakeholder involvement
- [ ] Underestimated integration complexity
- [ ] Unrealistic ROI expectations and timeline
- [ ] Inadequate training and change management - no champion internally
- [ ] Overlooking compliance and data privacy requirements
- [ ] No defined exit strategy or internal documentation
- [ ] Selection based on the lowest price instead of the overall value to your organization

By following this checklist, your organization has the ability to ensure a smoother technology implementation and maximize the return on your investment.

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