CHECKLIST

Change Management Checklist

How can you reduce the pain and plan ahead when it comes to changing software solutions in your organization? Here's a start! Learn how you can get your team on track as quickly as possible with our change management checklist.

Use the checklist below to evaluate your change management process:

Organizational change

Have you explained why the organization is changing?

System change

Have you explained how the new system works?

User guide creation

Create a user guide that includes how the systems tie in with existing business processes.

Let's get training!

Deliver training through face-to-face methods if possible (or over web conferencing) giving users a chance to ask questions as you step through the process.

Keep a record

Record your training, so you have something to refer back to, or can forward to new staff.

Test environments

Let users play in a sandbox enviroment, so they can familiarize themselves with the system without impacting important customer data.

Problem register

Let your users know what to do if they encounter an issue using the system. Is there an internal team they should direct questions/issues to?

Setting your goals

Define measurable goals for the implementation, and track them - don't forget to celebrate when they're achieved.

Monitor and mitigate risk

Monitor and mitigate the risks, assumptions, and issues, being experienced as part of the implementation. A well thought through support process is crucial to assisting with mitigation.

Grin and bear it!

Change is always uncomfortable, and you will encounter resistance. Sometimes users just need to be able to vent, so hear them out. Gently remind them of the benefits of the change, give them some time to become accustomed to the new ways of working.

About Skedulo

Skedulo is the platform for intelligent mobile workforce management. Our solution helps enterprises intelligently manage, schedule, dispatch, and track resources in the field, whether they are full-time, part-time, or contract employees.

With native solutions that integrate seamlessly to Salesforce and ServiceNow, and our independent platform that connects to any system of record, Skedulo offers enterprises and mid-market companies a mobile workforce management product that complements any tech stack.

Founded in 2013, headquartered in San Francisco and with offices in Australia, Vietnam, and the United Kingdom, Skedulo has enabled over 100 companies to seamlessly schedule and service more than 5 million appointments all around the globe. The company secured $9.2 million in Series A funding in 2016, led by Costanoa Ventures. For more information, please visit www.skedulo.com, or our blog, @Skedulo, Facebook and LinkedIn pages.