

## TECH IMPLEMENTATION PLANNER

Implementing a new technology, you have a major impact on your business. Use this planner and best practices to develop an implementation plan based on small, management steps.

		Tasks	Owner	Due Date
Week 1	PREPARE	Identify and review your current processes (or “workflows”) that will incorporate this new technology.		
		Document your new business processes with the new technology		
	LEARN	Train your employees. Typically, this will be done by the sales rep of the company supplying the tech		
Week 2 (optional)	PLAN FOR BETA	Select a small, willing, group of clients from your ideal client profile (don’t just grab the tech savvy clients, unless that is your ideal client overall)		
		Consider adding an incentive for taking part of the BETA		
		Set expectations for usage, testing, and feedback collection		
		Identify BETA clients in CRM using Keywords		
Week 3 (optional)	BEIN BETA	Launch the new technology for the selected BETA clients		
		Notify clients in BETA		
		Schedule and execute client training (if needed)		
Week 4 (optional)	BETA FEEDBACK	Reach out, schedule, and execute on feedback collection meetings OR consider outsourcing to a client advisory board		
		Document feedback		
		Determine if you should proceed with the tech implementation based on client feedback		

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WEEK 5	TEST	Before incorporating the new technology into your process, make sure your team is aware of how it is used, when, and why		
		Confirm your workflows as a team		
	LAUNCH	Begin using the new tool in your normal day-to-day. Make sure to continue discussing and documenting your successes and failures as a team, so you have them for your next tech review		
		(Optional) Launch for all clients		
	MARKETING	Send out marketing campaign		
Emphasis (client-centric) benefits				
Offer a short training guide (if needed)				
WEEK 6	DEFINE METRICS	Identify any reports or trackable metrics that can help determine adoption and usage. This will help for the follow-up review in determining whether to keep the new technology or find a replacement option		
ONGOING	POST MORTEM	Report on metrics at your annual Tech Stack Review		
		Continue to collect and review client feedback (if applicable)		