

Checklist for Implementing a New Tool

Overarching Considerations

Identify the goal the new tool will achieve

Goal 1:

Goal 2:

Tip: Use SMART goals (Specific, Measurable, Attainable, Relevant/Realistic, Timely)

Determine stakeholder involvement (Who is involved + What are their roles and responsibilities)

Primary stakeholder(s):

Secondary stakeholder(s):

Tip: Assign reasonable responsibilities + clearly communicate responsibilities with each stakeholder

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Assess Factors for Implementation Readiness

Qualitative	Quantitative
<ul style="list-style-type: none">• 1:1 Outreach / User case studies:	<ul style="list-style-type: none">• Available metrics to identify:
<ul style="list-style-type: none">• Surveys / interviews:	<ul style="list-style-type: none">• Supporting readiness
	<ul style="list-style-type: none">• Potential roadblocks / issues to readiness

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Finalize Your Communication / Reporting Plan

- Frequency of Status Updates (Weekly / Bi-Weekly / Monthly)
- What metrics should be tracked?
- Determine your message approach:
 - Top-down: Firmwide → Practice Group / Departments → Individual
 - Bottom-up: Individuals → Test / Beta Group → Practice / Department → Firm (as necessary)

Checklist for Implementing a New Tool

Test + Train

Test

- Macro-level: Will tool achieve the overarching goal the Firm set out to achieve?
- Micro-level: What unique cases present roadblocks / opportunities

Train

- Determine best way to facilitate learning: live demo / hands on exercise, recorded video, pamphlet, etc.
- Rollout: Starting with Day 1 skills to specific use cases → Consider gamification to incentivize progress

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Monitor Implementation

How are you tracking progress?

What metrics define success?

Monitor progress on an agreed upon cadence --. Proactively communicate with struggling / roadblock users

Take corrective action as necessary

RACI Chart Example

Tasks	Person 1	Person 2	Person 3	Person 4
(First task)	R	C	A	I
(Next task)	R	C	A	I
(Next task)	C	A	R	I
(Next task, etc.)	R	C	A	I

R = Responsible
A = Accountable
C = Consulted
I = Informed

Questions and Answers