Custom Software
Implementation Checklist

CREATED BY
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Is your business ready to roll out your new custom software? Great!

Before you dive into the implementation process, it goes a long way to define your game plan and commit to it. It ensures this exciting phase is the most rewarding part of your custom software journey!

Use this checklist alongside our **Custom Software Implementation Guide** to create a clear, strategic rollout process for your new software to your organization.

1. Team and Roles

Choose your rollout leads and define their responsibilities throughout the implementation.

Stakeholder Name(s) and Role(s):

2. Set Key Metrics

How will you know if your project was successful? Set your key metrics that will measure the business impact and ROI of your new solution.

Why are you implementing new custom software?

Describe the current state of the organization and any areas you'd like to improve. Use these metrics as benchmark numbers to compare performance metrics to later.

Where do you plan the business to be after this project?

Gather input from project stakeholders to define your key metrics that will measure your project's success. Make sure they align with the business problems you identified above.

3. Rollout Timeline

When is the ideal time to start your implementation? Do you have a "busy season" to avoid?

EXAMPLE

Milestone: beta testing
Stakeholders/audience: finance department
Deadline: end of Q1

Milestone:
Stakeholders/audience:
Deadline:

Milestone:
Stakeholders/audience:
Deadline:

Milestone:
Stakeholders/audience:
Deadline:

4. Create a Rollout Plan

When is the ideal time to start your implementation? Do you have a “busy season” to avoid?

Setting your rollout plan can help instill confidence in the process. While it doesn’t have to be perfect, it should be a reference point for all.

What should we include in our rollout plan?

- ✓ ______________________________
- ✓ ______________________________
- ✓ ______________________________
- ✓ ______________________________

How will we share the rollout plan?

Choose a place for the rollout plan that’s easy to find for everyone.

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5. Communicating Your Rollout Plan

When is the ideal time to start your implementation? Do you have a "busy season" to avoid?

Implementations take time and energy. Throughout the project, it's important to keep employees focused on "why" you're implementing new processes and tools. You're all in this together!

What is the core message or value you want to communicate with employees throughout the project?

Can you turn that core message into a motivational phrase or key message to use during implementation? i.e. "Leveling Up Logistics" or "Streamline Sales"

6. Risk Analysis

The best way to avoid any significant issues during rollout is to plan ahead for them.

What risks could put your project in jeopardy? What can you do now to avoid them from happening?

Follow these steps to lead your team through a project "pre-mortem" to hypothesize what could go wrong during your project. Write down what the main risks are and what your team can do upfront to avoid them.

PREDICTED RISK	HOW WE CAN PREVENT IT

7. Planning for 'a-ha' Moments

It’s normal to experience a few ‘a-ha’ moments during the project. Your team might uncover a feature that needs tweaked or added.

It’s best practice to include a ‘contingency budget’ to take advantage of these insights. A rule of thumb is to include 10-15% of the initial development costs for each phase.

PHASE	DEVELOPMENT COST	EXPECTED CONTINGENCY BUDGET

TOTAL BUDGET:

8. Implementation Phases

Implementing new custom software in phases allows your organization to adjust to change strategically.

Identify the following for each implementation phase. This will help you plan what to include in each rollout phase and when, based on the overall impact each phase will have on your people and processes during implementation.

People: You can stagger phases by business area, department, or starting internally before customers.

Business Impact: Consider how implementation will disrupt daily routines and current processes.

Rollout Dates: Pick the optimal time to introduce the team to new processes and tools.

PHASE	PEOPLE	BUSINESS IMPACT	ROLLOUT DATES

9. Celebrating Your Launch

Once things are running smoothly, ask employees and your rollout team to share any data or stories about your new processes.

Gather feedback through:

- Mini success stories from employees
- Happy customer testimonials
- Screenshots of the tool's dashboard illustrating your progress
- Have a team member record a 30 second "hype" video with their phone

How will you celebrate these wins and share them with the whole organization?

10. Planning for the Future

After your initial rollout is completed, what's next?

- ✓ ____
- ✓ ____
- ✓ ____

Working with your development partner:

Support: What does support look like after implementation? Who can you call when you need something?

Phase 2: How can you proactively plan for Phase 2 (and beyond)? The best part of custom software is that the solution scales with you.

Growing with your team:

Growth: Ask your team how you can continue to expand your solution. How can custom software meet any foreseen changes in the industry? What are the organization's plans for the future and how can custom software help?

Empower product owners: Allocate a budget for front line product owners to add new value-add features and enhancements with your development partner.

Sticking with your Game Plan
Be committed to your plan and development partner. It's the best way to ensure all the hard work, time, and energy put into your new solution is fully realized by your team!

If you have any questions about your custom software implementation, contact SPARK today and see how we can help.

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