Implementing a new system in the workplace

This checklist sets out the steps you need to take to make sure a new system is effectively implemented into your company's workflows.

Brief

- [ ] Talk to employees that are going to use the new system
- [ ] Create a summary of use cases
- [ ] Check existing skill levels

Staff training

- [ ] Share introductory resources offered by the supplier
- [ ] Update visual reminders such as signs or notes on equipment
- [ ] Rewrite digital documentation
- [ ] Make sure the team is aware of these reference points

Contingency planning

- [ ] Decide how you're going to measure outputs for quality assurance (eg. customer feedback, glitches, product issues)
- [ ] Identify dependencies that need to be monitored
- [ ] Create a contingency plan if the new system has to be taken offline

Announcement

- [ ] Let the team know a system is going to change
- [ ] Remind them closer to the launch
- [ ] Announce the switch over
- [ ] Tell people when the old system becomes obsolete

Continues >>>

be the business

Tools and templates

Set expectations

- [ ] Tell the team why the change is being implemented
- [ ] Be clear about what the new system can do – and any limitations
- [ ] Support employees who are struggling

Get feedback

- [ ] Check in periodically to see if the new system is working as expected
- [ ] Identify any additional training needs