Part One – Asking the Right Questions

In Preparation for any transition, it is important that you take the time to stop and ask the right questions in order to give yourself and your team the great chance for success.

1. Do you have the necessary resources to make this change?

a. How Strong is your Cash Position?	
b. Do you have the people in place to manage the change effort?	
c. Do you have the processes (structure) in place to facilitate this change?	

Comments:

2. What behavior modifications are needed before we start?

a. As a management team what are you going to do to change?	
b. Are these policies written down to support staff throughout these processes?	
c. Do you have clear goals defined in order to achieve success?	

Comments:

3. Have you assembled a team to Lead?

a. Have you defined the roles and people accountable for making this successful?	
b. Have you engaged with staff on this transition to explain the overall vision?	
c. Have you allowed the team to define their own goals?	
d. Have you created an "action plan" to map out the path to success?	
e. Have you considered any outside assistance?	

Comments:

4. Have you done your due diligence?

a. Have you checked references?	
b. Have you asked your peers? (What are they doing/What have then done?)	
c. Have you checked with third parties (Pro Advisors, Consultants, etc.)?	

Comments:

5. Are you Committed?

a. Do you have management (owner) support?	
b. Do you have a plan for facilitating road blocks/challenges during this transition?	
c. Do you have a plan for dealing with employee change resistance?	

Comments:

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Part Two – Understand What is Required

Once you have set the foundation for this change, created a vision and asked the right questions. Does your team understand what is required of them in order to make this change successful?

1. Do you have a Champion?

a. Do you have individual(s) for facilitating the implementation process?	
b. Do you have individual(s) that will coordinate the project "action plan"?	
c. Do you have a list of requirements that need to be met before going live?	

Comments:

2. Do you have Administrative Support?

a. Do you know who is accountable for data entry?	
b. Do they understand the consistent processes required for entry?	
c. Does your team understand what they are accounting for inputting?	
d. Do you understand the roles and securities that need to be in place?	

Comments:

3. Do you have employee buy-in?

a. Do you understand what time needs to be invested for each employee?	
b. Does the team understand what is required of them?	
c. Make success about benefits to the employee not just the company.	

Comments:

4. Do you have a way to measure Sucuess?

a. What does Success look like on an employee level?	
b. What does Success look like on a management level?	
i. What is the goal that are set for the future? (1 Year, 5 Years, 10 Years)	

Comments:

5. Is the technology a good fit for the company?

a. Does this technology fix the issue(s) that prompted this change?	
b. Will this technology be able to grow with your company?	
c. Is this vendor in it for the long term relationship?	

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Part Three – Overcoming Challenges

Once your team has made a decision and decided to pull the trigger you are not out of the woods yet. What is the on-going plan to maintain success moving forward and overcome challenges that will arise.

1. Requires Strong Leadership

a. Success starts at the top, strong leadership breeds a strong organization	
b. Have an organizational Hierarchy and understand how to escalate issues	
c. Leadership needs a vision and clear understanding of how to follow it	

Comments:

2. Define Goals

a. Are the goals realistic and achievable?	
b. Does your team understand the path required to hitting targets?	
c. Do you have a plan to deal with staff struggling to achieve their goals?	

Comments:

3. Have an Action Plan?

a. Define accountability to layout timeline & targets?	
b. Meet on a Regular basis to review action plan and ensure it is still on track	
c. Crawl, Walk, Run (Take on these changes in steps or stages not all at once)	

Comments:

4. Set Expectation up front?

a. Understanding the vision (big picture) & what is required?	
b. Discuss change management & how to handle adjustments to scope.	
c. Have a plan for dealing with change resistance	

Comments:

5. Continued Education?

a. Provide opportunities for continued learning and education.	
b. Stay up to date on technology and always look for ways to improve.	
c. Find opportunities to adapt to different styles of learning	

Comments:

6. Practice Consistent & Accurate Information?

a. Provide opportunities for the team to measure their progress	
b. Establish Policies and Procedures that enforce best practices.	
c. Ensure admins keep Information is kept, clean up to date.	

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Part Three – Overcoming Challenges

7. Make it about them (Your People)?	
a. Position this change for employees to see & understand the benefits	
b. Create Incentives and Commission that knowledge great work & performance	
c. Break Bad Habits, by showing better solutions	
Comments:	

8. Build Strong Relationships with your Vendor?	
a. Create long term relationships that offer opportunities to share feedback	
a. Take the time to listen, understand and educate yourself on what is possible.	
Comments:	

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