



What Should I Do?

Follow these steps to encourage and sustain user adoption before, during and after implementing a new PM tool at your SMB.



Before you Buy

- ☐ Establish a team to manage organizational change
- ☐ Craft an organizational change plan
- ☐ Identify a need for change
- ☐ Perform stakeholder impact analysis
 - ☐ Identify end users and each user group's immediate needs
 - ☐ Answer "What's in it for me" for each group
- ☐ Finalize tool capabilities required by stakeholders

During the Selection Process

- ☐ Involve end users with vetting shortlist of products
- ☐ Have end users demo each product
 - ☐ Ask "Does it align with existing workflows?"
 - ☐ Ask "Does it solve our immediate needs and drive near-term goals?"
 - ☐ Consider ease-of-use

After Implementation

- ☐ Introduce new tool to the organization, tailor communications to user groups
 - ☐ Address how each group will be impacted and the timing of the impact
- ☐ Offer formal and in-formal training options designed to address needs of users
- ☐ Avoid "one-size-fits-all" sessions
- ☐ Encourage feedback
- ☐ Identify and close learning gaps over life span of PM tool