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