## Change Management Preparation

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Details</th>
<th>Stakeholders</th>
<th>Accountable Person</th>
<th>Time Req.</th>
<th>Date</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Set the stage, prepare your people</td>
<td>(requires some emotional intelligence)</td>
<td>Project Manager, Supervisors, Implementation Team</td>
<td></td>
<td>30-60 min</td>
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<tr>
<td>what happens if you don’t prepare people</td>
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<td>“road signs” (how signs go up in advance</td>
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<td>before work is begun)</td>
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<td>(draw on the previous section)</td>
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## Set up and Configuration

### Kick-Off Meeting
- Roll-Out Meetings Lead by CSM - 20 minute introductory meetings regarding license set up, training offerings, and how to use within the sales cycle
- Project Manager, Supervisors, Implementation Team
- 30-60 min.

### Deployment
- Vendor Configures Account
- 1-2 Days

### Establish Weekly Review
- Weekly roll-out project status call with lead contact
- 30-60 min.

## Launch Communication

### Documentation
- Launch Announcement with Kick Off Meeting Schedule
- Email

### Training Information
- Follow up notification w/ training schedule
- Email

## Onboarding / Training Events

### Admin Training
- Admin training
- 45-60 min.

### End-User Training
- Custom/Private Trainings for users
- 60-90 min.

## On-Demand Training

### Admin and End-User Training
- Navigate to Vendor Provided Trainings. Possibly organize sessions amongst different stakeholder teams.
- 60-90 min.
- On Demand

## Adoption

### Track Usage
- Monitor usage & begin weekly emails / reporting out
- 30 min.

### Meet weekly or bi-monthly with account owner to track preliminary progress.
- Meet weekly with account owner and any stakeholders. Go over to progress and status of user adoption and congratulate high performers
- 1 hr.

### One Month Analysis
- Schedule review for analysis of first month results
- 1 hr.

## On-GOing Management

### Pro-active QBRs
- Conducted quarterly or as needed with the customer. Goal of highlighting useful information, data analytics and trend analysis making key recommendations where needed. Review any current product updates and/or roadmap where appropriate.
- 1-2 hrs.
- 1 month from launch, then Quarterly