

Change Management Rollout Checklist

A 90-day framework for making technology and process changes stick — from current-state mapping through sustained adoption.

Change being implemented: _____

Rollout owner: _____

Target go-live date: _____

Pilot property/team: _____

Phase 1: Map the Current State (Weeks 1–2)

Before you configure anything, understand how work actually flows today.

- Shadow the team — document real workflows, not handbook workflows
- Identify pain points the change should address (from the team's perspective)
- Document existing workarounds and what they solve
- Select pilot property/team (choose for honest feedback, not compliance)
- Define what success looks like — specific, measurable outcomes
- Identify the "what's in it for them" message for frontline staff

Biggest frontline pain point this change addresses: _____

How will you know the rollout succeeded?: _____

Phase 2: Pilot (Weeks 3–4)

Test with one team. Let them break it, shape it, and become your champions.

- Deploy to pilot property with close, on-the-ground support
- Be present — watch how people actually interact with the new system
- Document every friction point, question, and workaround that emerges
- Adjust configuration, workflow, and training materials based on feedback
- Close feedback loops visibly — tell pilot team when their input led to a change
- Update training materials to reflect real workflows, not assumed ones
- Confirm the pilot team is willing to champion the broader rollout

Key adjustments made during pilot: _____

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Phase 3: Phased Rollout (Weeks 5–8)

Expand in groups, not all at once. Lead with the problem it solves.

- Define rollout groups and sequence
- Lead messaging with the frontline pain point it solves
- Train on the workflow, not the features ("here's how your morning changes")
- Provide on-the-ground support during each group's first week
- Use pilot team as peer champions with each new group
- Monitor for workarounds — they signal design problems, not attitude problems
- Acknowledge the valley — everything is slower during transition

Rollout group sequence: _____

Phase 4: Measure and Reinforce (Weeks 9–12)

Track adoption, fix holdout issues, and celebrate the wins.

- Track usage patterns — not just logins, but actual workflow adoption
- Identify holdouts and their specific reasons (almost always design issues)
- Fix the issues holdouts identify — and announce the fixes
- Measure against success criteria defined in Phase 1
- Celebrate wins visibly: time saved, errors reduced, problems caught earlier
- Confirm the old way is fully decommissioned — no parallel systems
- Set review date: 30 days post-rollout to assess sustained adoption

Adoption rate at 90 days: _____

30-day review date: _____

Five Principles to Reference Throughout

- 1. Design around the workflow, not the feature.** Train on how the day changes, not what buttons do.
- 2. Solve a problem they feel.** If it doesn't address a frontline pain point, adoption will be compliance-driven at best.
- 3. Make the old way harder than the new way.** Not punitively — structurally. If the new system isn't easier, the spreadsheet survives.
- 4. Close the loop visibly.** When feedback leads to a change, announce it. Silence after complaints kills adoption.
- 5. Support through the valley.** The post-go-live period when everything is slower is when rollouts die. Stay present.

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