



The New Tool Adoption Checklist

Most new tools don't fail because they're bad – they fail because rollout was an afterthought. Abandoned logins, workaround spreadsheets, half-adopted systems. This 12-step checklist takes a tool from "let's try this" to "the team actually uses it." **Work it top to bottom for any tool you introduce.**

Phase 1 — Assess (before you commit)

- 1. Name the problem it solves**
Write one sentence: "This tool fixes ____." If you can't, stop – you're buying a solution looking for a problem.
- 2. Confirm it beats what you already have**
Could an existing tool do this with a tweak? New tools add complexity; make sure the gain is worth it.
- 3. Check the real cost**
Seats, tiers, add-ons, and the hours to set it up and train people – not just the sticker price.
- 4. Verify it fits your stack & rules**
Does it integrate with your core tools? Does it clear IT, security, and data-privacy requirements? Ask before, not after.
- 5. Pick one owner**
Every tool needs a single person responsible for it. No owner = slow death. Usually that's you.

Phase 2 — Roll out (introduce it well)

- 6. Set it up before anyone sees it**
Configure, connect, and remove the confusing defaults first. A messy first login kills adoption instantly.
- 7. Pilot with a small group**
Two or three willing people for one or two weeks. Fix the friction before the whole team touches it.
- 8. Write the 1-page "how we use this"**
Not the vendor's manual – your rules: what it's for, what it's not for, the 3 things everyone must do.
- 9. Launch with the "why," not just the "how"**
Tell people what problem it solves for them and what old thing they can stop doing. Adoption follows relief, not features.
- 10. Kill the old way on a set date**
If the old spreadsheet still works, people use it. Announce the switch-off date and hold it.

Phase 3 — Sustain (make it stick)

- 11. Check adoption at 2 and 6 weeks**
Who's actually using it? Where are people slipping back? Fix the friction or clarify the rule – early.
- 12. Review it quarterly**
Still earning its cost and its complexity? Keep, fix, or cut. Tools you stop needing should be retired on purpose.

Rollout red flags to catch early: logins nobody activated, a "shadow" spreadsheet still in use, one person doing it "the real way" on the side, and "we're still figuring out how we use it" three months in. Each one means a step above got skipped – go back and close it.

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