

Small Business Implementation Checklist

1. Planning Phase

- ☐ Define clear goals: What specific problem are we solving?
- ☐ Set 2-3 measurable success metrics
- ☐ Identify who needs to be involved and assign roles
- ☐ Create a simple timeline with key milestones
- ☐ Determine budget and resource requirements
- ☐ Identify potential risks and simple backup plans

2. Preparation Phase

- ☐ Document current workflow that will be changing
- ☐ Create basic design of new process/system
- ☐ Develop straightforward training materials
- ☐ Set up necessary equipment or software
- ☐ Test the process/system with a small group
- ☐ Create easy-to-follow user guides

3. Launch Phase

- ☐ Communicate changes clearly to everyone affected
- ☐ Deliver training to all users
- ☐ Go live with new process/system
- ☐ Provide hands-on support during initial days
- ☐ Track and quickly address any issues
- ☐ Gather immediate feedback from users

4. Sustain Phase

- ☐ Check in with users after 1 week, 1 month, 3 months
- ☐ Make necessary adjustments based on feedback
- ☐ Create process for ongoing training for new employees
- ☐ Monitor key metrics to confirm improvement
- ☐ Share success stories and positive results
- ☐ Plan for future enhancements

Tips for Success

- Keep it simple - start with the most critical features

- Involve your team from the beginning to build buy-in
- Be present and visible during the rollout
- Celebrate small wins and acknowledge team efforts
- Focus on one change at a time to avoid overwhelming staff
- Be patient - adoption takes time and consistent support