

CHECKLIST

Ensure Your Success: Checklists for Implementing and Upgrading Software

Whether you are implementing a new system or upgrading existing software, the following self-assessment checklists offer guidance that will help to ensure a successful process with minimal disruption to your day-to-day business operations.

10 Self-Assessment Questions for Implementing New Software

1. Have all outstanding issues been resolved and all questions answered?
2. Are the expectations of all internal parties (senior management, product teams, software developers, account managers) aligned?
3. Have start and end dates been determined?
4. Are interim milestones set?
5. Is there a dedicated project manager or project team?
6. How is change management handled?
7. What processes does the vendor have for reporting and responding to issues?
8. What are acceptable turnaround times for responding to issues?
9. Does the vendor provide a license for the test environment?
10. How will the new software work with our existing systems? Which systems, if any, could the software replace?



15 Self-Assessment Questions for Successful Software Upgrades

1. Do we have a document describing the typical business procedures we perform with the software that will be upgraded?
2. Are all involved parties aligned and up-to-date?
3. Is there a detailed backup plan?
4. Has a dedicated project manager been assigned?
5. Have we identified a period of lower business activity when upgrading will be the easiest to manage and have the least impact on day-to-day operations?
6. Has timing been agreed by all groups?
7. Do we fully understand the changes included in the upgrade and how they affect typical business processes?
8. Is there a detailed test plan? Who will technically perform the upgrade and when?
9. Has a separate test environment with the same parameters as our production environment been set up?
10. Have we restored the most recent backup of our database from production on the test server prior to installing a new version on the test environment?
11. Has the upgrade been installed on the test environment?
12. Did we run our main business processes on the test environment after installing the new version there?
13. Have all processes, integrations, databases and workflows that are outside the vendor's responsibility been fully tested on the test environment?
14. Have all steps outlined in the test plan been followed and all stakeholders signed off?
15. Are all processes running smoothly? If so, the update can be installed into production.