



Software Implementation Readiness Checklist

Prepared by BuyQ Consulting Services

For School Leaders Preparing for a New Platform Rollout

Set the foundation for long-term success—before implementation begins.

Note: This checklist is intended as a foundational guide to support your planning process. It's not exhaustive and should be adapted to align with your school or organization's specific needs, systems, and strategic priorities.

☒ 1. Clarify Your Goals

- We've identified the core problem(s) this software is solving
- We've defined success for this implementation (e.g., efficiency, cost savings, adoption rate)
- We know how we'll measure ROI post-launch (e.g., time saved, error reduction, user satisfaction)

☒ 2. Assess the Vendor

- The vendor has experience with schools or organizations similar to ours
- We've asked about data security, integration capabilities, and implementation support
- We've seen a demo of real workflows—not just a feature overview
- We've received references from similar schools or districts
- Post-launch support has been clearly defined

3. Evaluate the Platform

- The platform supports our existing workflows or offers clear paths for customization
- It integrates with current systems (SIS, ERP, HRIS, etc.)
- We understand how data will be imported/exported
- We've reviewed training resources for both users and admins
- We've discussed future scalability (3–5 years)
- We know what's included in the base price and any optional costs

4. Engage the Right Team

- We've identified internal champions or “super users”
- Key roles are defined (decision-makers, project leads, tech support, etc.)
- Staff have bandwidth for implementation tasks and training
- Leadership is aligned on timing and expectations

5. Prepare for Go-Live

- We've developed a phased rollout plan or pilot strategy
- Internal communication plan is in place (with timelines and messaging)
- A post-launch review is scheduled (3–4 weeks after go-live)
- We have a process for collecting and acting on feedback
- We've identified sample KPIs to track after launch

Bonus Tip: Don't go alone. Leverage vendor resources, peer networks, and internal collaboration to ensure your platform meets real organizational needs.