

Phased Rollout Planner

Launch in phases, not all at once — protect your team and your business.

WHAT THIS PLANNER DOES

Most technology rollouts fail because everything goes live at once — too much change, too fast, for too many people. This planner breaks your launch into 4 structured phases with clear tasks, owners, success criteria, and a go/no-go gate between each one. Use it to protect team productivity, catch problems early, and build the kind of adoption that sticks. Works for any technology — from a new CRM to an accounting platform to a full operations suite.

HOW TO USE IT

1 Set up your rollout

On the Setup page, enter your vendor, go-live date, and team. Assign a Phase Owner to each of the 4 phases — one accountable person per phase keeps execution tight.

2 Work through each phase in order

Each phase has a task checklist, a timeline band, and a success-criteria gate. Don't advance to the next phase until every gate criterion is met.

3 Use the gate check before advancing

Each phase ends with a GO / PAUSE / FIX gate. Honest gate checks stop small problems from becoming expensive failures after full deployment.

4 Debrief on the final page

After Phase 4, complete the post-launch review. What worked, what slipped, and what to do differently on the next rollout.

Time to complete

15–30 min setup; update weekly

Works best with

Your rollout team + vendor contact

Have ready

Signed contract + onboarding timeline

Complete this page before your first team meeting.

One owner per phase — clear accountability is what keeps a rollout from stalling.

ROLLOUT DETAILS

Business / organization

Technology being rolled out

Prepared by

Vendor / product name (exact tier)

KEY DATES

Contract signed

Phase 1 start

Target full go-live

Post-launch review

ROLLOUT TEAM ROSTER

One owner per phase — accountability drives execution

ROLE / PHASE OWNER	NAME	EMAIL / CONTACT	AVAILABILITY
Rollout Lead (overall owner)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phase 1 Owner — Foundation	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phase 2 Owner — Pilot	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phase 3 Owner — Full Deploy	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phase 4 Owner — Optimize	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor Onboarding Contact	<input type="text"/>	<input type="text"/>	<input type="text"/>
IT / Systems Admin	<input type="text"/>	<input type="text"/>	<input type="text"/>
Training Lead	<input type="text"/>	<input type="text"/>	<input type="text"/>

YOUR 4-PHASE LAUNCH TIMELINE

Fill in your actual target dates



GATE CHECK RULE

Complete all gate criteria before advancing — partial launches create double the support burden.

Complete each phase checklist. Run the gate check before advancing.

The gate readiness box updates as you tick criteria — in Adobe Acrobat Reader.

1 Phase 1 — Foundation Start End
System setup, data migration, and core configuration

TASK	OWNER	STATUS	NOTES
<input type="checkbox"/> Complete vendor onboarding call <i>Schedule within 48 hrs of signing</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Set up admin account & user roles <i>Configure permissions before inviting users</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Import / migrate existing data <i>Clean data first — garbage in, garbage out</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Configure core settings & workflows <i>Match to your business processes</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Set up integrations with key tools <i>CRM, email, accounting, etc.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Test system with sample data <i>Confirm data integrity before pilot</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Document internal support process <i>Who do staff call when something breaks?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PHASE 1 GATE CHECK — do not advance until every box below is true

- Admin account is fully configured and tested
- Data migration completed and verified — no critical errors
- All integrations are connected and working
- At least 2 team members can navigate the system independently
- Vendor onboarding contact confirmed and responsive

GO
 PAUSE
 FIX IT

2 Phase 2 — Pilot Start End
2–5 power users testing real workflows and reporting back

TASK	OWNER	STATUS	NOTES
<input type="checkbox"/> Select 2–5 pilot users (power users) <i>Choose confident, willing early adopters</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Brief pilot users on goals & scope <i>What to test, how to report issues</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Run pilot users through core workflows <i>Real tasks, real data — supervised first time</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Collect daily feedback for 2 weeks <i>Use a simple form or chat channel</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Log all issues, bugs, and workarounds <i>Track everything — even minor friction</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Address critical issues with vendor <i>Escalate showstoppers immediately</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Update training materials from feedback <i>Fix confusion before full rollout</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PHASE 2 GATE CHECK — do not advance until every box below is true

- All pilot users completed at least 5 real tasks independently
- Critical issues resolved or have a confirmed vendor fix date
- Training materials updated based on pilot feedback
- Pilot users are willing to support peers during full rollout
- No unresolved data integrity problems

GO
 PAUSE
 FIX IT

Complete each phase checklist. Run the gate check before advancing.

The gate readiness box updates as you tick criteria — in Adobe Acrobat Reader.

3 Phase 3 — Full Deployment Start End
All users onboard, training complete, old system retired

TASK	OWNER	STATUS	NOTES
<input type="checkbox"/> Send all-team launch announcement <i>Date, what changes, where to get help</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Invite all remaining users to system <i>Set up accounts before training sessions</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Run group training sessions <i>Role-based groups — not one-size-fits-all</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Assign a go-to person per team <i>Peer champion reduces support load 60%+</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Set up help resources in-system <i>Pinned guides, FAQs, video links</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Turn off / retire the old system <i>Confirm date — running both creates confusion</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Hold daily check-in for first week <i>15-min stand-up to catch blockers early</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Track adoption by team / department <i>Who is using it? Who needs more support?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PHASE 3 GATE CHECK — do not advance until every box below is true

- 100% of users have active accounts and can log in
- All training sessions completed — attendance documented
- Old system decommissioned or access restricted
- No critical support tickets unresolved for more than 24 hrs
- Adoption rate above 80% for core workflows at end of Week 6

GO **PAUSE** **FIX IT**

4 Phase 4 — Optimize Start End
30-day review, adoption habits locked, vendor feedback submitted

TASK	OWNER	STATUS	NOTES
<input type="checkbox"/> Conduct 30-day adoption check-in <i>Review usage data and team confidence</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Survey users on satisfaction (1–5) <i>What works, what frustrates, what's missing?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Review system reports for data quality <i>Check for errors, blanks, and bad habits</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Submit feature requests to vendor <i>Prioritize the top 3 team pain points</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Update SOPs and internal guides <i>Reflect how the team actually uses it now</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Celebrate the win with your team <i>Adoption is a change-management success</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Schedule 90-day and 6-month reviews <i>Lock in ongoing accountability dates now</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PHASE 4 GATE CHECK — do not advance until every box below is true

- Adoption rate at or above 85% for core workflows
- User satisfaction average at 3.5+ out of 5
- Top 3 friction points have an action plan (vendor fix or workaround)
- SOPs and guides updated and accessible to all staff
- 90-day review date confirmed in the calendar

GO **PAUSE** **FIX IT**

Log issues as they arise. Track adoption every week.

RISK & ISSUE LOG

Log any blocker, risk, or problem the moment it appears

#	ISSUE / RISK DESCRIPTION	PHASE	OWNER	PRIORITY	STATUS	RESOLUTION / NOTES
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

WEEKLY ADOPTION TRACKER

Update each week during Phases 2–4 · adoption rate auto-calculates

METRIC	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8
Total users invited								
Active users (logged in)								
Adoption rate % (active ÷ invited)								
Core tasks completed								
Support tickets opened								
Critical issues open								
Team confidence (1–5 avg)								

TIP If adoption rate drops below 60% by Week 4, stop and run a targeted 1-hour re-training session before continuing.

Plan training by role — not one-size-fits-all.

A sales rep and a finance manager don't use the same features — so don't train them the same way.

TRAINING PLAN BY ROLE

ROLE / TEAM	#	KEY FEATURES TO TRAIN	FORMAT	TRAINER	DATE	DONE
Management / Leadership	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Sales / Account Mgmt	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Finance / Billing	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Operations / Fulfillment	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Customer Service	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
IT / Admin	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

TRAINING FORMAT GUIDE

Live group session	Core users, complex workflows, Q&A-heavy topics. 60–90 min max.
1-on-1 walkthrough	Managers, power users, resistant adopters. 30–45 min.
Recorded video	Simple tasks, reference material, new-hire onboarding.
Written quick guide	Step-by-step tasks users can follow at their own pace.
Peer champion model	Ongoing support — assign 1 champion per team of 5–10.

VENDOR TRAINING RESOURCES AVAILABLE

Ask your vendor: what's included vs. what costs extra?

Live onboarding sessions	<input type="text"/>	Self-paced video library	<input type="text"/>
Help center / documentation	<input type="text"/>	Dedicated CSM / account manager	<input type="text"/>

Complete this page after Phase 4 is finished.

PHASE COMPLETION SUMMARY

PHASE	TARGET DATE	ACTUAL DATE	GATE PASSED?	NOTES
1 Phase 1 — Foundation	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 Phase 2 — Pilot	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 Phase 3 — Full Deployment	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 Phase 4 — Optimize	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

POST-LAUNCH REVIEW

Answer honestly after completing Phase 4

What went better than expected?

Wins worth repeating on the next rollout

What took longer or cost more?

Budget, timeline, or effort surprises

What would you do differently?

The honest lesson for next time

What still needs fixing?

Outstanding issues or requests

Team confidence in the new system (1–5)

Current honest average — not wishful thinking

ROLLOUT STATUS

- COMPLETE** All 4 phases done — go to Step 6
- IN PROGRESS** Rollout ongoing — update weekly
- STALLED** Adoption <60% or critical issues open
- RESTART** Major failure — document why first

SIGN-OFF

Rollout complete & approved

Rollout Lead

Approved by

Date completed

NEXT → Step 6: 90-Day Adoption & Impact Tracker

The launch is just the beginning — measure whether the tool is actually working for your business.

bizhealth.ai/biztools/technology