

Tech Implementation Planner.

Implementing a new technology, you have a major impact on your business. Use this planner and best practices to develop an implementation plan based on small, management steps.

		TASKS	OWNER	DUE DATE
Week 1	PREPARE	☐ Identify and review your current processes (or “workflows”) that will incorporate this new technology.		
		☐ <u>Document your new business processes</u> with the new technology		
	LEARN	☐ Train your employees. Typically, this will be done by the sales rep of the company supplying the tech		
Week 2 (optional)	PLAN FOR BETA	☐ Select a small, willing, group of clients from your ideal client profile (don’t just grab the tech savvy clients, unless that is your ideal client overall)		
		☐ Consider adding an incentive for taking part of the BETA		
		☐ Set expectations for usage, testing, and feedback collection		
		☐ Identify BETA clients in CRM using Keywords		
Week 3 (optional)	BEGIN BETA	☐ Launch the new technology for the selected BETA clients		
		☐ Notify clients in BETA		
		☐ Schedule and execute client training (if needed)		
Week 4 (optional)	BETA FEEDBACK	☐ Reach out, schedule, and execute on feedback collection meetings OR consider outsourcing to a client advisory board		
		☐ Document feedback		
		☐ Determine if you should proceed with the tech implementation based on client feedback		



Information provided by Independent Advisor Solutions by SEI, a strategic business unit of SEI Investments Company (SEI).

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Week 5	TEST, TEST, TEST	☐ Before incorporating the new technology into your process, make sure your team is aware of how it is used, when, and why		
		☐ Confirm your workflows as a team		
	LAUNCH	☐ Begin using the new tool in your normal day-to-day. Make sure to continue discussing and documenting your successes and failures as a team, so you have them for your next tech review		
		☐ (Optional) Launch for all clients		
	MARKETING	☐ Send out marketing campaign		
		☐ Emphasis (client-centric) benefits		
Week 6	MARKETING	☐ Offer a short training guide (if needed)		
Ongoing	DEFINE METRICS	☐ Identify any reports or trackable metrics that can help determine adoption and usage. This will help for the follow-up review in determining whether to keep the new technology or find a replacement option		
Ongoing	POST MORTEM	☐ Report on metrics at your annual Tech Stack Review		
		☐ Continue to collect and review client feedback (if applicable)		

