



# Technology Rollout Support and Mitigation CHECKLIST

**Ensure your next tech rollout is smooth, successful, and stress-free for both staff and customers.**

This checklist is designed to help you minimize friction during new technology deployments by focusing on training, communication, and real-time support. Use it to align your team and anticipate challenges at every phase of the rollout process.

## **Pre-Launch (4–6 Weeks Before Launch)**

### **Staff Preparation**

- ☐ Deliver role specific training using microlearning modules
- ☐ Include simulations and walkthroughs with real-life customer scenarios to boost confidence
- ☐ Identify and train internal “technology champions” to support peers
- ☐ Launch an internal chatbot or knowledge base for on-demand answers

### **Customer Communication**

- ☐ Announce the upcoming changes across all of your channels: email, SMS, app, website
- ☐ Create short explainer videos, tutorials, or walkthroughs for visual learners
- ☐ Publish FAQs and how-to guides on your website and mobile app
- ☐ Prepare in-branch posters or digital signage to reinforce messaging

## Launch Week

### Staff Activation

- ☐ Deploy trained tech champions across branches or contact centers
- ☐ Monitor frontline feedback daily and update internal resources in real time
- ☐ Ensure staff have easy access to training and troubleshooting content via mobile or desktop

### Customer Support Tools

- ☐ Activate in-app walkthroughs, tooltips, and banners to guide users
- ☐ Highlight a “What’s New” section with interactive guides on your website or app
- ☐ Offer temporary phone or chat support enhancements
- ☐ Add in-branch “tech help” stations for hands-on assistance (if applicable)

## Post-Launch (1–4 Weeks After Launch)

### Review and Optimize

- ☐ Monitor support requests and customer feedback trends
- ☐ Update tutorials, walkthroughs, and chatbot answers based on real user issues
- ☐ Share internal wins, success stories, and lessons learned to reinforce best practices
- ☐ Survey both customers and staff to measure adoption and satisfaction

## Tools That Can Help

### The right tools can make all the difference in ensuring a smooth technology rollout

- ☐ **Microlearning Platforms** – Deliver fast, focused training in small, work-friendly chunks.
- ☐ **Scenario-Based Training** – Boost confidence with real-world practice.
- ☐ **Knowledge Bases or Chatbots** – Provide instant, accurate answers to speed up service.
- ☐ **Digital Guidance Tools** – Walk customers through tasks, step by step.
- ☐ **Omnichannel Tools** – Keep messaging consistent across all channels.

## Ready to Roll Out with Confidence?

Build a smoother, smarter rollout—train your team, support your customers, and simplify change.

[Book a Demo](#)