Work Order Rollout Plan (Example)

Rev. 8/17/2017

Steps to a Rollout

1. Devise a plan
   a. Identify who needs to be involved
   b. Address any Constraints and Risks
   c. Gain Agreement with Key Stakeholders
   d. Determine how you are going to manage process
   e. Define who will support this new process moving forward (MOST MISSED ITEM)
2. Communicate plan to stakeholders (Internal and external)
   a. This should be clear and consistent
   b. Include a POC if there are questions
3. Execute Plan
   a. Make sure your resources are ready
   b. Follow the plan as described, that is the reason it is there
   c. Adjust the plan if needed and communicate the changes
4. Monitor Process
   a. Numbers don't lie, compile stats as the rollout happens and address issues as they come up
5. Finish and close out
   a. Complete the plan entirely, do not leave anything off
   b. Talk with team members about how it went, document those observations and issues you encountered
   c. Confirm support process is in place and working

Sample Plan

Stakeholders – these people should be kept in the loop on all activities

Trainers
- Regional Support Team, Divisional Support Team

NVR Users
- PJMs, CCMs, PMs
- BO is a maybe since they do not NEED access to SchedulePro to process WOs

Vendors
- Generation of Work Order tickets (field supervisors)
- Estimation of non PO requests (if applicable)
- Submission of non PO invoices relating to Work Orders

Risks and Constraints – Your plan needs to take these into account

- Labor Day – Short week
- Planned Vacation/Time Off
- Existing meetings (Start/Production/etc)
- End of the Month
- Vendor Availability/Limitations
- Geographical limitations of stakeholders
- Existing projects and commitments
- Start of the School Year

Communications – Outline of how and when you will communicate with Stakeholders

- Need all planned meetings as outlook invites
- Need Skype or Join.Me for anything web based
- Email schedule to vendors by 8/29
- Setup Sign-up-genius for vendor meetings?
- Plan on follow up email 1 week after go live to all users
- Create an email with training materials for user requests
- Send email remaindering people of SchedulePro Support Site

Training Plan

- Schedule one class for each division, provide a makeup session for anyone who cannot attend (alternative class)
- Offer 2-3 Vendor training sessions, can be via Join.me/Skype but offer in person for users who need help
- Provide training site for those who request it

Monitor

- Assign person(s) to monitor dashboard, address Pending and Overdue
- Assign Person(s) to identify misuse of process (creating WOs for Punch-out items)
- Maintain list of FAQ
- Maintain list of trained vendors, NVR users until rollout is complete
- Weekly Check-ins with Sean (Q+A)
- Enforce Adoption (method is TBD)

Close out

- Perform a lessons learned after Go-Live, then again 2 weeks later
- Save all materials in central location