Rollout Steps
Version 1.0a

Initiate
☐ Identify objectives
☐ Identify key stakeholders and contributors
☐ Determine scope, approach, and backup/rollback strategy
☐ Evaluate impact of hardware/software change(s)
☐ Familiarize staff with application system/program(s)
☐ Establish key process areas (i.e., project, risk and change management)

Define
☐ Identify business functions affected
☐ Generate Network Flow Diagrams (NFD) (indicates sequencing)
☐ Build Enterprise Model or Master Flow Diagram (MFD) (maps all deployment events and relationships among functional areas)
☐ Perform data and function analysis
☐ Document and validate hardware requirements (storage volume, user list, site, and interface requirements)

Design
☐ Identify macro/architectural design changes
☐ Identify programs/components to be changed or added
☐ Define file/database changes
☐ Walk-through design

Pilot
☐ Plan pilot(s)
☐ Select users and location(s)
☐ Prepare users
☐ Deploy pilot(s)
☐ Train, support, and monitor users (scope, cost, interoperability, and downtime issues)
☐ Obtain users’ feedback (forms, surveys, reports, and observations)
☐ Evaluate pilot results
☐ Change design or process
☐ Reassess risks, contingency and rollback plan

Plan
☐ Define hardware and system software requirements
☐ Evaluate other projects and systems for overlap, interfaces, and impacts
☐ Plan for file/database conversions
☐ Develop or revise test plans and scripts
☐ Develop user/operator training
☐ Schedule deliveries and installation
☐ Identify support and operations roles and responsibilities
☐ Schedule training for users, operators, and support staff
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Setup
☐ Setup test lab (mirror user’s environment)
☐ Establish platform level environmental controls (security, backup, and contingency)
☐ Develop hardware/system software acceptance test strategy and plan
☐ Walk-through installation plan
☐ Reaffirm overall scope, plan, and rollout process

Develop
☐ Design new software components
☐ Program changes to existing software components
☐ Program new components
☐ Perform unit test

Configure
☐ Identify hardware components
☐ Identify system software (i.e., utilities, user interface software)
☐ Identify communications software
☐ Identify furniture, supplies, and equipment requirements
☐ Reaffirm overall scope, plan, and rollout process

Procure
☐ Establish selection criteria
☐ Prepare RFPs or RFIs
☐ Select vendor(s) or product(s)
☐ Negotiate contract(s)
☐ Execute purchase agreement(s)
☐ Review, approve, and integrate vendor(s) plan(s)
☐ Monitor vendor(s) and conduct formal reviews

Accept
☐ Receive hardware and software
☐ Perform acceptance test(s) on hardware and software

Rollout
☐ Prepare site (un-boxing and staging)
☐ Prepare and distribute user list, troubleshooting notes, contact list, guides and scripts, and handbooks
☐ Brief field team members
☐ Communicate to users
☐ Identify backups to make before and deployment
☐ Steps for migrating (include automated and manual upgrades)
☐ Install new hardware/software
☐ Develop or revise user and operations documentation, and training materials
☐ Train users, operators, and support staff
☐ Perform system regression test and rework
☐ Perform acceptance test and rework
☐ Prepare for transition
☐ Perform data conversions
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- Perform environment tests
- Complete system installation
- Validate installation
- Operational procedures (permissions, passwords, and restoring user data)
- Perform asset management (account for all hardware/software deployed)

**Closure**
- Evaluate project performance
- Evaluate system performance
- Prepare closure report
- Archive deliverables