



Change & Adoption Readiness Checklist

Every phase covered. Every team ready.

From discovery to hypercare.

Delivered by Allied ESM, Certified Halo ITSM Partner

How to use this checklist

Change & Adoption

A successful ITSM implementation is only 30% technology – the other 70% is people, process, and communication. This checklist covers every phase of your go-live journey, from the first stakeholder briefing through to embedding the new system as business-as-usual.

Work through each section with your project team. Tick every item before moving to the next phase. If you identify gaps, use the insight to prioritise your change and communications activity.

5 Golden Rules for Change Communications

1**Communicate early**

Set expectations before the project starts. Silence breeds uncertainty.

2**Use multiple channels**

Email alone isn't enough. Use meetings, posters, intranet, face-to-face.

3**Tailor to your audience**

Leadership needs the 'why'. End users need the 'what' and 'how'.

4**Create feedback loops**

Give people a way to ask questions and flag concerns throughout.

5**Celebrate early wins**

Share positive stories from UAT and training to build confidence.

1 Leadership & Sponsorship

Secure the mandate before anything else.

<input type="checkbox"/>	Executive sponsor identified and briefed on the project vision and timeline. <i>The sponsor should be visibly engaged – not just named on a slide.</i>	T-8 Wks
<input type="checkbox"/>	Case for change articulated: leadership can clearly explain why this is happening. <i>People need to hear 'why' from leadership, not just 'what' from IT.</i>	T-8 Wks
<input type="checkbox"/>	Senior leaders committed to active, visible sponsorship throughout the project. <i>Passive support is not enough – sponsors should appear in comms and town halls.</i>	T-8 Wks
<input type="checkbox"/>	Department heads individually briefed ahead of wider all-staff communications. <i>Managers should never hear big news at the same time as their teams.</i>	T-6 Wks
<input type="checkbox"/>	Named change lead assigned with dedicated capacity for this work. <i>Change cannot be a side-of-desk activity for someone already stretched.</i>	T-8 Wks

2 Stakeholder & Audience Mapping

Know your audiences before you communicate.

<input type="checkbox"/>	All impacted groups identified: All Staff, Dept Heads, Champions, UAT Volunteers, End Users. <i>Different groups need different messages, different detail, and different timing.</i>	T-8 Wks
<input type="checkbox"/>	Stakeholder map created showing each group's level of impact and influence. <i>High-impact, high-resistance groups should receive dedicated engagement plans.</i>	T-8 Wks
<input type="checkbox"/>	Tailored messages drafted for each audience – 'why' for leadership, 'what & how' for end users. <i>Generic all-staff messaging often fails the people who need the most support.</i>	T-6 Wks
<input type="checkbox"/>	Resistant or at-risk stakeholder groups identified with targeted engagement in place. <i>Early identification allows you to manage concerns before they become blockers.</i>	T-6 Wks

<input type="checkbox"/>	<p>Champions network identified across key departments and business areas.</p> <p><i>Choose people with peer credibility, not just availability.</i></p>	<p>T-6 Wks</p>
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3 Communication Planning

Plan early, use multiple channels, keep it two-way.

<input type="checkbox"/>	<p>Communications plan in place covering all phases – project launch through hypercare.</p> <p><i>An ad hoc approach almost always leaves critical audiences under-informed at the wrong moment.</i></p>	<p>T-8 Wks</p>
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<input type="checkbox"/>	<p>Communications begin at least 8 weeks before go-live – not 2 weeks before.</p> <p><i>Starting too late is the single most common change communications failure.</i></p>	<p>T-8 Wks</p>
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<input type="checkbox"/>	<p>Multiple channels planned: email, town hall, team meetings, intranet, posters, floor walkers.</p> <p><i>Rely on email alone and you will miss a significant proportion of your audience.</i></p>	<p>T-6 Wks</p>
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<input type="checkbox"/>	<p>Key messages drafted for each project phase and reviewed by the executive sponsor.</p> <p><i>Consistency between what leadership says and what IT says builds trust.</i></p>	<p>T-6 Wks</p>
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<input type="checkbox"/>	<p>FAQs document published and updated continuously throughout the project.</p> <p><i>Proactively answering common questions reduces rumour and helpdesk volume at go-live.</i></p>	<p>T-4 Wks</p>
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<input type="checkbox"/>	<p>Two-way feedback channels established – people can ask questions and raise concerns.</p> <p><i>Broadcasting without listening signals that concerns don't matter.</i></p>	<p>T-8 Wks</p>
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4 Champions Network

Build your peer network before training starts.

<input type="checkbox"/>	<p>Champions identified across key teams – chosen for credibility and communication skills.</p> <p><i>A champion with credibility in their team is worth ten top-down communications.</i></p>	<p>T-6 Wks</p>
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<input type="checkbox"/>	<p>Champions formally launched and briefed on their role, time commitment, and expectations.</p> <p><i>Champions need to know what is expected of them – a vague ask produces vague results.</i></p>	T-6 Wks
<input type="checkbox"/>	<p>Champions involved in UAT and training preparation – not just go-live support.</p> <p><i>Early involvement creates advocates who have real confidence in the system.</i></p>	T-4 Wks
<input type="checkbox"/>	<p>Champions equipped with talking points, FAQs, and a clear escalation path.</p> <p><i>Champions should never be left exposed – give them the tools to support their peers.</i></p>	T-2 Wks
<input type="checkbox"/>	<p>Champions network has a regular check-in rhythm with the project team.</p> <p><i>Keep champions connected and informed throughout – don't just activate them at go-live.</i></p>	T-6 Wks

5 Training & User Readiness

Train users on the real system, not a generic demo.

<input type="checkbox"/>	<p>Training needs analysis completed – different roles may need different training content.</p> <p><i>A service desk agent and a manager need very different training experiences.</i></p>	T-4 Wks
<input type="checkbox"/>	<p>Training schedule confirmed and communicated to all end users well in advance.</p> <p><i>Last-minute training invites drive poor attendance and poor retention.</i></p>	T-4 Wks
<input type="checkbox"/>	<p>Training content reflects the actual configured system – not an out-of-box demo.</p> <p><i>Training on the wrong configuration erodes confidence and creates costly confusion on Day 1.</i></p>	T-3 Wks
<input type="checkbox"/>	<p>Reminder communications issued ahead of training sessions.</p> <p><i>A single calendar invite is not enough. Remind. Confirm. Follow up.</i></p>	T-2 Wks
<input type="checkbox"/>	<p>Training attendance tracked – follow-up sessions arranged for anyone who missed.</p> <p><i>Going live with untrained users is a predictable, avoidable problem.</i></p>	T-1 Wk
<input type="checkbox"/>	<p>User Acceptance Testing (UAT) completed with representative end users.</p> <p><i>UAT is your last real chance to catch configuration issues and gather pre-go-live confidence.</i></p>	T-4 Wks

6 Go-Live Preparation

Day 1 should feel planned, not improvised.

<input type="checkbox"/>	Day 1 Guide created and distributed to all staff before go-live. <i>Users should know exactly what to do, where to go, and who to call on launch day.</i>	T-1 Wk
<input type="checkbox"/>	Support channels confirmed and communicated: helpdesk, floor walkers, drop-in sessions. <i>Don't wait for users to struggle. Proactively deploy support where the work happens.</i>	T-1 Wk
<input type="checkbox"/>	Leadership go-live message prepared, personalised, and scheduled for Day 1 morning. <i>A visible message from the executive sponsor on Day 1 signals that this launch matters.</i>	T-1 Wk
<input type="checkbox"/>	Final countdown communications issued in the week before go-live. <i>Build anticipation and reinforce readiness – not anxiety. Keep the tone confident and helpful.</i>	T-1 Wk
<input type="checkbox"/>	'What to expect on Day 1' brief shared with all users in the final few days. <i>Surprises erode trust. Tell people what will change, when, and how it will affect their day.</i>	T-1 Wk
<input type="checkbox"/>	IT, helpdesk, and support teams briefed and prepared for elevated Day 1 query volume. <i>The first 24 hours set the tone for adoption. Invest in visible, responsive support.</i>	T-0

7 Hypercare & Embedding

The 4 weeks after go-live are as important as the 4 weeks before.

<input type="checkbox"/>	Hypercare period defined and communicated – Allied ESM recommends a minimum of 4 weeks. <i>Hypercare is not optional. It's where adoption is won or lost.</i>	T+0-4 Wks
<input type="checkbox"/>	Drop-in support sessions scheduled for the weeks immediately following go-live. <i>Give users a low-pressure way to ask questions and build confidence.</i>	T+1 Wk
<input type="checkbox"/>	Pulse survey issued in Week 1 to gather early user feedback. <i>Act on the feedback quickly – demonstrating responsiveness drives trust in the project.</i>	T+1 Wk

<input type="checkbox"/>	Quick wins and early success stories captured and shared with the wider organisation. <i>Visible evidence that the system is working accelerates adoption across the business.</i>	T+1-2 Wks
<input type="checkbox"/>	Known issues or fixes communicated to affected users with clear resolution timelines. <i>Transparency during issues builds credibility. Silence breeds frustration and rumour.</i>	T+1-2 Wks
<input type="checkbox"/>	Transition from hypercare to BAU support agreed and communicated well in advance. <i>Users should never feel the rug pulled from under them. Signal the transition clearly.</i>	T+4 Wks



Need support with your Change & Adoption plan?

Allied ESM – your Certified Halo ITSM Partner.

Allied ESM specialises in Halo ITSM implementations that actually land – combining technical delivery with structured change management and communications planning. Whether you are in the early stages of evaluation or already preparing for go-live, our team can help you build the right plan for your organisation.

- Change & Adoption Planning – structured communications and engagement from day one
- Stakeholder Engagement – executive briefings to champions workshops
- Training Design & Delivery – role-based training built around your configured Halo system
- Go-Live & Hypercare Support – on-the-ground support through Day 1 and beyond

Get in Touch



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