

TECH UPGRADE CHECKLIST

Use this checklist to systematically evaluate and implement necessary technology upgrades.



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Step 1: Evaluate Current Technology

- ☒ List all tools and software currently in use.
- ☒ Identify tools with frequent downtime or performance issues.
- ☒ Note gaps in functionality or integration capabilities.

Step 2: Define Goals and Requirements

- ☒ Identify specific problems the upgrade should address.
- ☒ Outline must-have features and integrations.
- ☒ Align upgrade goals with long-term business objectives.

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Step 3: Research and Compare Options

- ☒ Identify tools that meet your needs and budget.
- ☒ Evaluate user reviews, case studies, and vendor demos.
- ☒ Check for scalability and future-proofing capabilities.

Step 4: Budget and Resources

- ☒ Allocate budget for licensing, implementation, and training.
- ☒ Identify team members responsible for managing the upgrade.
- ☒ Plan for ongoing maintenance and support costs.

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Step 5: Implementation Plan

- ☒ Create a phased rollout timeline.
- ☒ Schedule training sessions for employees.
- ☒ Test the new system with a small group before full deployment.

Step 6: Post-Implementation

- ☒ Gather feedback from users to address any issues.
- ☒ Monitor performance and ROI for the upgraded tools.
- ☒ Schedule regular reviews to ensure tools stay relevant.