

The tech onboarding checklist

Four ways to make new tech adoption easier

Organization

- 01 Seasonality – Tech projects should begin in slower periods
- 02 Authorities – Define who is in charge of the new system
- 03 Governance – Enforce rules for ingestion, changing, or tagging data
- 04 People – Identify skills needed and fill the gaps, as needed

Architecture and Reporting

- 05 Data Maps – Clearly identify all online and offline assets / data
- 06 Reporting maps – Understand what clients need from the system
- 07 Complexities – Address (and govern) challenging inputs or outputs

Ingesting Data

- 08 Feeds – Begin the administrative process of setting up feeds
- 09 Validations – Build additional time into the process for validating data
- 10 Historicals – Assess past data quality and quantity needed

Education

- 11 Make Time – Add training to the implementation calendar for key people
- 12 Learn from Peers – Complete calls with similar people at similar orgs