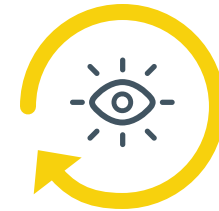




Ramp faster, drive user adoption, and accelerate revenue. With a comprehensive plan for implementing new technology, you can ensure your organization uses it to its fullest potential.

Change Management Success Checklist

Follow these steps to ensure a smooth transition from a legacy software system and minimize the risks associated with change.



UNDERSTAND CHANGE

What factors are contributing to or hindering my organization's performance?

- Identify the problem:** To implement change, you must understand the problem that you seek to solve.
- Define your objective:** Depending on your goal, how can you cut costs, minimize complexity, reduce waste, and/or improve productivity?
- Involve stakeholders:** Inform and get feedback from sales, marketing, and enablement teams, as well as other departments and partners in the process.
- Conduct a thorough needs analysis:** Identify the features and functionality required in the new system.



PLAN CHANGE

What are the most important capabilities of the new solution?

- Plan the transition:** Include scope, timeline, deliverables, resources, and metrics for success.
- Create a training and communication plan:** Include both self-guided and instructor-led training sessions, as well as communication channels for ongoing support.
- Research and compare solutions:** Get a list of vendors, research solutions and the advantages and disadvantages of each.
- Choose the right vendor:** Evaluate multiple options and select one with a proven track record of delivering high-quality enablement systems.



The ability to manage change can make or break your success. Empower your team with the skills, knowledge, and content they need to drive results anywhere, anytime.



COMMUNICATE CHANGE

What does each stakeholder care about and how does this change impact them?

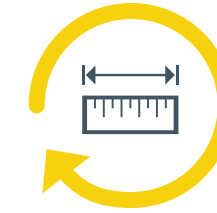
- Communicate reasons for change:** Provide a compelling vision of the future state to motivate and inspire employees.
- Be transparent:** Communicate early and often about what needs to change and more importantly, why it needs to change.
- Understand impact:** Think about the things that are important to each stakeholder and address specific benefits for them.
- Line up champions:** Identify leaders and high-performing sales reps who can act as evangelists.



IMPLEMENT CHANGE

What is the process for migrating data and content from the legacy platform?

- Migrate data and content:** Transfer data and content from the legacy platform.
- Test and evaluate:** Test the new system thoroughly to identify any issues or bugs before rolling it out to all users.
- Train employees:** Support employees to ensure they have the skills and knowledge needed to use the new software system effectively.
- Manage resistance:** Anticipate resistance by addressing concerns, providing regular updates, and communicating the benefits.



MEASURE CHANGE

What metrics will you measure to track quantitative and qualitative success?

- Monitor progress:** Adjust the plan as needed to ensure the organization is on track to achieve its goals.
- Record benchmarks:** Record your baseline to make sure you can measure the impact of your solution.
- Set a timeline:** Establish a timeline of when you would like to hit certain benchmarks to keep moving forward.
- Consider key metrics:** Aside from seller adoption rates, other key metrics to consider include selling time, deal velocity, and quota attainment.
- Gather feedback:** Get qualitative feedback from your sales team to determine how to make further improvements.

About Allego

Allego is the future of sales enablement. Our sales enablement, learning, content management, and conversation intelligence products accelerate performance for sales and other teams. Allego is AI-driven and seller-centric, with the power, agility, insight, and ease you need to drive results in a hybrid world—all in a single app.

Learn more about sales enablement that wins sellers and buyers at allego.com.