

ADOPTION THAT STICKS

Implementation Health Check

1. Roles & Responsibilities

Do team members know what they own in the process?

Roles for requesters, buyers, evaluators, and approvers are clearly defined.

Responsibilities don't change depending on the project.

New staff can be onboarded into defined roles without the confusion.

If unclear roles exist, tasks will bounce around and users will default to email.

3. Governance Built In

Is compliance part of the process, or added after the fact?

All approvals and records are automatically tracked in the system.

Templates are version-controlled and easy to update.

The team no longer needs to recreate audit trails retroactively.

Governance should be invisible, but always on.

5. Training & Support

Are users confident and supported over time?

Training is practical, role-based, and ongoing.

"Power users" or internal champions help others.

Feedback loops are in place to adjust workflows.

Adoption is a process, not a one-time event.

2. Process Flow & Handoffs

Is the "right way" the easiest way?

Work stays inside the system throughout the solicitation process.

Approvals happen digitally, not over email or in meetings.

The number of steps and reviewers is minimized wherever possible.

Too many manual handoffs slow adoption and encourage workarounds.

4. Visibility & Reporting

Can you see where things are slowing down?

Cycle time and bottlenecks are easy to monitor.

Status is visible without needing to email someone.

You can measure improvements in time saved or process efficiency.

Without visibility, it's hard to improve or hold anyone accountable.

HOW DID YOU SCORE?

All boxes checked?

You're on track for lasting adoption.

3-4 boxes checked?

You've got momentum, but gaps may limit long-term value.

<3 boxes checked?

It's time to refocus your strategy. Adoption is the project.