Instructions: How to use this worksheet

The Rollout Planning Worksheet is a tool you can utilize to help you plan new application and feature rollouts to your district. The table below will help you fill out the Rollout Planning Worksheet and give you ideas to think about for each of the Plan, Prepare, Rollout, and Improve sections for your Pilot, Prototype, and General Availability rollout phases. Please copy this worksheet into the Google drive folder for your district so you can work on it separately.

|  |
| --- |
| **Guidelines** |
| **Plan** |
| * **Identify your stakeholders, user groups, and participants**
 | * Who are your power users?
* Who can represent a wider population of users?
 |
| * **Determine the parameters**
 | * Will prototype be interactive or paper?
* Will you use sample data?
* How will you collect feedback?
* Large group, 1 on 1?
 |
| * **Establish success metrics**
 | * Was the feedback impactful or useful in defining the right product features?
* Did you validate your assumptions?
 |
| **Prepare** |
| * **Develop communication plan**
 | * Audience members, communication frequency, medium used for communications (wiki, email, meeting, etc).
* Who will send communications?
* Supporting documents, instructions, intro videos, etc.
* Any special communications channels or plans for parents, teachers?
 |
| * **Prepare testing environment**
 | * Hardware needed.
* Where will it be held? Where is the right environment for testing?
* Will preliminary / smoke testing be done before wider rollout?
 |
| * **Create rollout schedule**
 | * Is there already an event like a professional development week that can be leveraged?
* What time of year is best?
 |
| * **Enlist participants**
 | * Survey, email, 1 on 1, how to sign up participants.
 |
| **Rollout** |
| * **Conduct rollout**
 | * Who is on the rollout team?
* Who is going to provide support for participants?
* What’s the schedule?
* Instructions, tutorials. Will there be different rollout instructions for each participant group?
 |
| * **Observe and identify training opportunities**
 | * Who will be the observer? Who will capture areas of challenge and participant feedback to be addressed later.
* Think about providing on-platform help and feedback mechanisms.
 |
| * **Adapt if necessary**
 | * Continuous improvement. Hold a post mortem on the session and adjust plans for next time.
 |
| **Improve** |
| * **Review results**
 | * Pareto analysis on areas of most improvement.
* Capture and prioritize important features for next phase.
 |
| * **Identify areas for improvement**
 | * Continuous improvement. Hold a post mortem on the entire phase and adjust plans for next phase.
 |
| * **Formulate next steps**
 | * Planning for next phase. What to work on, improved processes, etc.
 |

|  |
| --- |
| **Prototype - Roll out a test version** |
| **Plan** |
| * **Identify your stakeholders, user groups, and participants**
 |  |
| * **Determine the parameters**
 |  |
| * **Establish success metrics**
 |  |
| **Prepare** |
| * **Develop communication plan**
 |  |
| * **Prepare testing environment**
 |  |
| * **Create rollout schedule**
 |  |
| * **Enlist participants**
 |  |
| **Rollout** |
| * **Conduct rollout**
 |  |
| * **Observe and identify training opportunities**
 | *
 |
| * **Adapt if necessary**
 | *
 |
| **Improve** |
| * **Review results**
 |  |
| * **Identify areas for improvement**
 | *
 |
| * **Formulate next steps**
 | *
 |

|  |
| --- |
| **Pilot - Invite specific people / groups** |
| **Plan** |
| * **Identify your stakeholders and participants**
 | *
*
 |
| * **Determine the parameters**
 | *
*
 |
| * **Establish success metrics**
 | *
*
 |
| **Prepare** |
| * **Develop communication plan**
 | *
*
 |
| * **Prepare testing environment**
 | *
*
 |
| * **Create rollout schedule**
 | *
*
 |
| * **Enlist participants**
 | *
*
 |
| **Rollout** |
| * **Conduct rollout**
 | *
*
 |
| * **Observe and identify training opportunities**
 | *
*
 |
| * **Adapt if necessary**
 | *
*
 |
| **Improve** |
| * **Review results**
 | *
*
 |
| * **Identify areas for improvement**
 | *
*
 |
| * **Formulate next steps**
 | *
*
 |

|  |
| --- |
| **General Availability - Roll out to everyone** |
| **Plan** |
| * **Identify your stakeholders and participants**
 | *
*
 |
| * **Determine the parameters**
 | *
*
 |
| * **Establish success metrics**
 | *
*
 |
| **Prepare** |
| * **Develop communication plan**
 | *
*
 |
| * **Prepare testing environment**
 | *
*
 |
| * **Create rollout schedule**
 | *
*
 |
| * **Enlist participants**
 | *
*
 |
| **Rollout** |
| * **Conduct rollout**
 | *
*
 |
| * **Observe and identify training opportunities**
 | *
*
 |
| * **Adapt if necessary**
 | *
*
 |
| **Improve** |
| * **Review results**
 | *
*
 |
| * **Identify areas for improvement**
 | *
*
 |
| * **Formulate next steps**
 | *
*
 |