AgilityHealth® Org Baseline Rollout Checklist

30 Days prior to Rollout Kickoff Week:
- Pre-Rollout Call – 60 minutes
  - Overview of the Rollout Process
  - Identify Acceptance Criteria for the Rollout – desired outcomes and measures
  - Rollout Strategy
    - Identify Rollout Team; Roles and Responsibilities
    - Identify Programs – Size and Location
    - Identify Teams
  - Share Rollout Schedule and discuss preferred timeframe
  - Facilitators – define good candidates, who, training (private, in-person, virtual?)
  - Set Up Considerations discussion – Teams, Tags, Lines of Business, Programs, etc.
  - Whitelist AgilityHealth® Domains
    - send.agilityhealthradar.com
    - Agilityhealth.zendesk.com
    - AgilityHealthRadar.com or eu.AgilityHealthRadar.com
    - IP Address (static): 168.245.51.115

2 Weeks prior to Rollout Kickoff Week:
- AgilityHealth® Set Up Call – 90 minutes
  - Technical Set Up
    - Private Domain?
    - SSO?
    - Technical Review?
    - Integrations and Metrics?
  - Platform Set Up
    - Teams & Stakeholders
    - Tags
    - Feature Enablement
    - Users – Roles and Options
  - Rollout Communication
    - Leadership Email template sent by Customer Success
    - Stakeholder Email template sent by Customer Success
    - Team and ScrumMaster Email template sent by Customer Success
    - Intranet Site communication – optional, post 3-minute AgilityHealth® video
    - Role based training guides, other Support Center resources
    - Create Marketing flyers and FAQs – templated flyers sent by Customer Success
  - Prepare for Assessments
    - Security/Network for onsite ATI Team
    - Room requirements
    - Build Teams and Stakeholders in AgilityHealth®

1 Week Prior to Rollout Launch:
- Send Stakeholders their assessment questions (AHFs can do as a part of assessment launch process). Follow up with an email/phone call to them encouraging their participation and explaining why it's important.
- Send out meeting invitations to the team members, including:
  - Virtual Meeting Space for remote participants
  - Meeting Room information for on-site participants
  - Information about the AgilityHealth® Retrospective (use email templates for Leaders, Team Members and Stakeholders)
- If there is a video conference, please test the conference room to ensure the audio/visual is clear.