

PM Tool Rollout: 30-Day Checklist

Four weeks, one project at a time. Tick every box before moving to the next week.

Tool chosen: _____ Start date: _____ Rollout owner: _____

WEEK 1 - SET UP ONE PILOT PROJECT

- ☐ Create ONE real project (active client or live internal work)
- ☐ Define 3-5 statuses max (To do / Doing / Blocked / Done)
- ☐ Set a task naming rule: verb first, then object
- ☐ Invite the team - old system still runs in parallel

WEEK 2 - MOVE THE ACTIVE WORK

- ☐ Migrate every in-flight task: owner + due date on each
- ☐ KILL the old system - archive the spreadsheet, stop email triage
- ☐ Connect only the 2-3 integrations you'll actually use

WEEK 3 - WRITE THE TEAM RULES

- ☐ One rules page in the tool: tasks, due dates, decisions, daily check
- ☐ Move meeting agendas + action items into the tool
- ☐ Start the weekly 15-min review: blocked / due / stale

WEEK 4 - AUDIT AND ADJUST

- ☐ Count tasks created, completed, updated this week
- ☐ Talk to zero-activity teammates (no reminder emails)
- ☐ Delete statuses and fields nobody used
- ☐ Pick the paid plan with real usage data, not a features page

Golden rule: if it needs doing, it's a task in the tool. Email is for people outside the company.