Identifying the need for a new technology solution is just the first step, but the idea can be successful only if acted on. Like any large-scale initiative, building a proper project plan is the foundation for long-term success.

**Before getting started use:**

- The IT strategy template to document the firm’s IT objectives, strategy and measurements
- The IT governance checklist to align the firm and IT strategic plans
- The IT budget calculator to set firm technology cost expectations
- The Best practices checklist and/or Innovative practices checklist to identify new solutions needed to be a high-performing firm

This roadmap illustrates the best practices for firms to consider through the full life cycle of project implementation from evaluation through execution.

1. **Evaluation**
   - Identify the right solution (use the technology selection analysis questionnaire)
   - Integrate firm and IT strategic plans
   - Prepare IT leader or implementation team

2. **Implementation**
   - Kickoff
   - Develop strategy
   - Collect client and user data
   - Plan configuration
   - Facilitate training
   - Go live

3. **Execution**
   - Review analytics and reporting
   - Monitor

This roadmap is scalable, depending on the size of your firm. Firms with 10 or fewer people may be able to execute each step quickly and easily since a team of 4–5 often is working side by side daily. Conversely, larger, multi-location firms looking to implement a new technology solution across departments may need to be more deliberate to ensure each step is considered, especially in the evaluation process.