Digital Adoption Rollout Playbook (Work Sample)

An editable playbook for change enablement, UAT, and rollout. Designed to be shareable without disclosing confidential client details.

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Use: Portfolio proof asset | Template is public-safe. Insert client specifics only in private versions.

1) Program charter

- Goal: Improve adoption and proficiency of a new tool or workflow within a defined user population
- Scope: onboarding, UAT, launch comms, learning assets, support readiness, and measurement
- Out of scope: core product engineering roadmap (unless explicitly owned)
- Constraints: time, stakeholder availability, and change fatigue

2) Success metrics (examples)

- Adoption: activation rate, weekly active users, repeat usage by cohort
- Proficiency: task success rate, time to complete key workflows, error rate
- Support: tickets per 100 users, top reasons, deflection via knowledge base
- Business outcomes: cycle time reduction, quality, compliance, revenue or cost proxy metrics

3) Stakeholders and RACI (template)

Workstream	R	A	C	I
UAT planning and execution	Enablement lead	Product owner	SMEs, QA	Leadership
Comms and launch readiness	Enablement lead	Program sponsor	HR/Comms	Managers
Training assets and job aids	LXD or enablement	Program sponsor	SMEs	All users
Support and KB readiness	Support lead	Support manager	Enablement	All users
Measurement and reporting	Enablement lead	Program sponsor	Analytics	Leadership

4) Rollout phases (recommended)

- Discover: define audiences, workflows, and change impacts

- Prepare: UAT plan, comms plan, training assets, support readiness
- Pilot: validate workflows with a small cohort, revise assets
- Launch: staged rollout, office hours, daily monitoring
- Stabilize: reduce tickets, close gaps, update KB
- Optimize: measure outcomes, improve content, refine governance

5) UAT plan (public-safe template)

UAT validates that the solution meets business intent and is usable by real users. This template includes only the structure. Insert client-specific scenarios in a private version.

5.1 Entry and exit criteria

- Entry: stable build, environments ready, test data prepared, test users scheduled
- Exit: critical defects resolved or waived, acceptance criteria met, sign-off documented

5.2 Test scenarios and scripts (examples)

Scenario	User goal	Expected result	Pass?
S1: First-time login	Access system and locate dashboard	User can log in and find key navigation	
S2: Core task A	Complete the primary workflow	Task completes without errors and confirmation is visible	
S3: Exception handling	Handle a common edge case	System provides guidance and does not block progress	
S4: Reporting	Find a status or report	Report is accessible and matches expected data	

5.3 Findings log (template)

ID	Issue	Severity	Owner	Status

6) Comms plan (plug-and-play templates)

6.1 Manager note (short)

Why we are changing: [one sentence]. What is expected: [two bullets]. What success looks like: [one metric]. Where to get help: [link].

6.2 Launch message (short)

- Benefit: what improves for the user
- Do today: the first task to complete
- Learn: 2-minute demo and quick start guide link

6.3 Week 1 follow-up

- Top FAQs and short answers
- Office hours schedule and sign-up link
- Known issues and what is being fixed
- Quick link to KB and job aids

7) Enablement assets checklist

- 2-minute demo video or walkthrough
- Quick start guide (one page)
- Job aid for the top 3 workflows
- FAQ and troubleshooting page
- Office hours plan and escalation path

8) Measurement and governance

- Weekly dashboard: adoption, proficiency, and ticket trends by cohort
- Monthly review: what to remove, simplify, or automate
- Quarterly refresh: update job aids, improve onboarding, and re-baseline KPIs

Confidentiality and usage

This playbook is designed as a work sample. Replace placeholders with private client details only when permitted.