

TECHNOLOGY 101 ASSESSMENT & IMPLEMENTATION CHECKLIST

A practical framework for evaluating, selecting, implementing, and supporting healthcare technology

1 DEFINE THE NEED

☐ Clearly define the problem or opportunity.	☐ Document the current-state workflow.
☐ Identify who is affected by the problem.	☐ Define the desired future state.
☐ Identify organizational constraints and assumptions.	☐ Define clinical, operational, or patient care goals.
☐ Determine how technology could address the need.	☐ Consider whether a technology solution is actually necessary.

Notes: _____

2 IDENTIFY STAKEHOLDERS

☐ Identify executive and organizational leadership.	☐ Identify clinical stakeholders.
☐ Identify operational stakeholders.	☐ Identify IT and technical support stakeholders.
☐ Identify privacy, security, compliance, or legal stakeholders.	☐ Identify patient, caregiver, or end-user representatives.
☐ Define stakeholder responsibilities.	☐ Establish decision-making authority.

Key question: *Who will use it, support it, fund it, be affected by it, and be accountable for it?*

3 ESTABLISH REQUIREMENTS

MUST-HAVES	NICE-TO-HAVES
☐ _____	☐ _____
☐ _____	☐ _____
☐ _____	☐ _____
☐ _____	☐ _____
☐ _____	☐ _____

Organizational considerations

☐ Budget	☐ Staff capacity
☐ Technical infrastructure	☐ Implementation timeline
☐ Connectivity requirements	☐ Patient accessibility and usability
☐ Training requirements	☐ Regulatory, privacy, and security requirements

4 ASSESS TECHNOLOGY OPTIONS

Market review

☐ Identify potential solutions.	☐ Review product documentation.
☐ Review independent resources and references.	☐ Compare competing solutions.
☐ Document capabilities and limitations.	☐ Ask Peer Organizations about similar solutions.

Evaluate fit and ask important questions

☐ Alignment with clinical goals and workflows.	☐ Support and training requirements.
☐ Technical compatibility and dependencies.	☐ Total cost of ownership/ROI.
☐ User experience and accessibility.	☐ Limitations, risks, and tradeoffs.
☐ Resources and workflow changes required.	☐ Support available after deployment.

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5 VALIDATE & SCORE FINDINGS

☐ Establish evaluation criteria before scoring.	☐ Assign weights based on organizational priorities.
☐ Evaluate each option consistently.	☐ Document supporting evidence.
☐ Remove vendors that don't meet Must-Have requirements	☐ Test technology against real-world workflows.
☐ Identify risks, concerns, and unanswered questions.	☐ Compare findings against organizational constraints.

Category	Weight	Score	Weighted Score
_____	____%	___ / 4	_____
_____	____%	___ / 4	_____
_____	____%	___ / 4	_____
_____	____%	___ / 4	_____
_____	____%	___ / 4	_____
Total	100%		

Decision question: Which solution has the highest probability of success for our organization, users, and patients?

6 IMPLEMENT & MONITOR

☐ Confirm scope and objectives.	☐ Establish implementation timeline.
☐ Define project roles and responsibilities.	☐ Identify required organizational resources.
☐ Configure systems and workflows.	☐ Address privacy and security requirements.
☐ Test critical workflows before go-live.	☐ Train end users and support staff.
☐ Establish support and escalation pathways.	☐ Define success measures.
☐ Establish monitoring and reporting processes.	

Before go-live

☐ Workflows tested	☐ Integrations validated
☐ Security and compliance requirements verified	☐ User training completed
☐ Support process established	☐ Deployment criteria met
☐ Documentation completed	☐ Stakeholder approval received

7 POST-IMPLEMENTATION REVIEW

☐ Did the technology solve the original problem?	☐ Are desired outcomes being achieved?
☐ Are patients or users receiving expected benefits?	☐ Are workflows improved?
☐ Are adoption goals being met?	☐ Are there unexpected consequences?
☐ Are support requirements acceptable?	☐ Are costs aligned with expectations?
☐ Have new risks emerged?	☐ Is the technology still appropriate for the organization?

Question: What have we learned that will improve future evaluations and implementations?

WHAT WORKED?	WHAT DIDN'T?	WHAT SHOULD WE CHANGE?
_____	_____	_____
_____	_____	_____