Software Vendor - Security Checklist

Compliance Verification Guide for
Safety Management Software

Vendor Assessment & Implementation Planning

Implementation Success by Design

Safety software implementations can transform organizational safety management when executed properly. However, rushed or poorly planned rollouts often create more problems than they solve, leading to user resistance, data quality issues, and failed adoption.

A structured approach to rollout planning is essential to:

➜ **Ensure successful user adoption and sustained engagement**

➜ **Maximize return on investment and operational efficiency gains**

➜ **Minimize implementation risks and costly revision work**

➜ **Achieve compliance goals and safety performance improvements**

This checklist helps you evaluate software vendors and plan your implementation to ensure a successful rollout that delivers long-term value to your organization.

1. Implementation Support & Services

	Check Points	Notes
☐	**Data Migration Assistance** Does the vendor provide dedicated support for data migration including data formatting, template provision, and quality verification? Can they handle phased migration following logical sequences (locations → users → records → configurations)?	
☐	**Implementation Timeline Guidance** Does the vendor provide realistic timeline estimates based on your organization size and complexity? Do they offer written scope of work documents outlining expected timelines and deliverables?	

	Check Points	Notes
☐	**Training and Support Resources** What training resources are available, including live sessions, recorded videos, written guides, and hands-on practice opportunities? Is there dedicated implementation specialist support during the rollout period?	
☐	**Customization vs. Configuration** Can the software be configured to match your workflows without expensive custom development? What customization options are available and what are the associated costs and timeline impacts?	

2. Rollout Strategy Options

	Check Points	Notes
☐	**Phased Implementation Capability** Does the software support rolling out modules incrementally (e.g., forms first, then training management, then asset tracking)? Can you implement by department or user group to manage change gradually?	
☐	**Pilot Program Support** Does the vendor offer pilot or demo environments for testing before full commitment? Can pilot data be migrated to the production system to avoid duplication of effort?	
☐	**Full Launch Support** For organizations choosing immediate full deployment, what support is provided for coordinated user activation and training?	
☐	**Scalability Planning** How easily can the system accommodate organizational growth and additional locations? What is the process for adding new modules or expanding functionality over time?	

3. User Management & Governance

	Check Points	Notes
☐	**Role-Based Access Control** Can you assign different permission levels based on job roles and responsibilities? Does the system support the principle of least privilege for security and operational clarity?	
☐	**Multiple Administrator Support** Can you designate multiple administrators with expertise in different modules? Is there support for distributed ownership (e.g., a forms specialist, a training administrator, and an asset manager)?	
☐	**User Onboarding Process** How easy is it to add new users and assign appropriate access levels? Can user provisioning be automated or integrated with existing HR systems?	
☐	**Change Management Tools** Does the system provide usage analytics to monitor adoption rates? Are there built-in communication tools for announcements and training notifications?	

4. Data Quality & Migration

	Check Points	Notes
☐	**Data Template Provision** Does the vendor provide formatted templates for data import? Is there guidance on data cleanup and standardization before migration?	

	Check Points	Notes
☐	**Historical Data Handling** Can the system accommodate incomplete historical records typical in safety management? How are data gaps and inconsistencies handled during migration?	
☐	**Data Validation** Are there built-in checks to ensure data quality and completeness during import? What validation occurs to prevent duplicate or conflicting records?	
☐	**Backup and Recovery** What happens to your data if migration issues occur? Is there a rollback process in place if problems are found after go-live?	

5. Training & Change Management Support

	Check Points	Notes
☐	**Administrator Training Programs** What is the recommended time commitment for administrators to learn the system thoroughly? Are there certification or competency validation processes available?	
☐	**End User Training Resources** What materials are provided for training field workers and other end users? Can training materials be customized with your organization's branding and specific processes?	
☐	**Ongoing Support Structure** What help desk or customer success support is available post-launch? Are there user communities or forums for peer support and best practice sharing?	
☐	**Training Effectiveness Measurement** How can you track whether users are successfully learning and adopting the system? What metrics are available to identify knowledge gaps or areas needing additional training?	

6. System Integration & Workflow

	Check Points	Notes
☐	**Existing System Integration** Can the software integrate with your current HR, payroll, or other business systems? What APIs or data exchange capabilities are available?	
☐	**Mobile Functionality** How well does the system work on mobile devices for field workers? Are there dedicated mobile apps or is browser-based access sufficient?	
☐	**Workflow Automation** What manual processes can be automated to reduce administrative burden? Can the system trigger notifications, assignments, or follow up actions automatically?	
☐	**Reporting and Analytics** What standard reports are available and how easily can custom reports be created? Can you export data for analysis in other tools if needed?	

7. Vendor Stability & Long-term Partnership

	Check Points	Notes
☐	**Implementation Track Record** How many similar implementations has the vendor completed successfully? Can they provide references from organizations comparable to yours?	
☐	**Product Development Roadmap** What new features and improvements are planned for the software? How are customer feedback and feature requests incorporated into development?	

	Check Points	Notes
☐	**Support and Maintenance** What ongoing support is included in your licensing agreement? How are software updates and new features deployed?	
☐	**Business Continuity** What is the vendor's financial stability and long-term viability? What data portability options exist if you need to change vendors in the future?	

8. Success Metrics & Evaluation

	Check Points	Notes
☐	**Baseline Measurement** Have you documented current performance metrics before implementation (e.g., time spent on forms, incident reporting delays, training tracking accuracy)?	
☐	**Success Criteria Definition** What specific, measurable outcomes will indicate successful implementation? How will you measure ROI and value realization over time?	
☐	**Adoption Monitoring** What tools are available to track user login frequency, feature utilization, and engagement levels? How will you identify and address adoption challenges?	
☐	**Continuous Improvement Process** How will you gather user feedback and implement system optimizations? What processes will you establish for ongoing training and user support?	

Pre-Implementation Planning Checklist

Before beginning your rollout, ensure you have:

Clear Implementation Goals

☐ Specific, measurable objectives defined
☐ Success metrics established
☐ Timeline expectations aligned with vendor recommendations

Organizational Readiness

☐ Executive sponsorship secured and actively engaged
☐ Implementation team identified with dedicated time allocation
☐ Change management plan developed

Data Preparation

☐ Current data inventory completed
☐ Data cleanup and standardization plan in place
☐ Migration priorities and sequencing determined

Resource Allocation

☐ Budget approved for full implementation scope including training and support
☐ Administrator time commitment (2-3 hours/week) confirmed
☐ End user training time scheduled

Communication Strategy

☐ Rollout announcement plan prepared
☐ Department-specific benefit messaging developed
☐ Resistance management approach defined

A successful safety software implementation requires careful vendor selection, thorough planning, and sustained organizational commitment. This checklist helps ensure you choose a vendor partner who can support your success and that you're prepared for the implementation journey ahead.

The investment in proper planning and execution pays significant dividends in user adoption, system effectiveness, and long-term value realization. Organizations that follow structured implementation approaches consistently achieve better outcomes and avoid the costly problems associated with rushed or poorly planned rollouts.

If you have any questions about using this checklist or need assistance with your safety software evaluation and implementation planning, please contact us at _____.