

### Tina's Rule

“Strive for production,  
not perfection.  
Go live. Stabilize.  
Then build.”

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## Beyond Go-Live: Your Post-Implementation Checklist

### Best practices from Blue Sage Solutions

Go-live is just the beginning. Use this checklist to stabilize, drive adoption, and maximize the long-term value of your LOS investment.

#### Stabilize First

- Resist the urge to optimize—focus on stabilization before adding features or enhancements
- Monitor loan pipeline flow, not just user activity
- Establish a low-friction feedback loop so users can surface issues and ask questions
- Stand up a war room or bridge line for users with urgent loan issues
- Track and address configuration gaps and process misalignments as they emerge

#### Support Your People

- Employee champions are active, visible, and responding quickly to user frustration
- Leadership is openly communicating and normalizing the learning curve
- Document and share a living FAQ is in place where users can easily access the info
- Negative talk about the new system is being addressed, not ignored
- Staff turnover risk is being monitored, especially on the sales side

#### Measure Adoption

- User complaints have shifted from “the system doesn’t work” to “I’m not sure how to do this”
- Loans are moving through the pipeline as expected
- Efficiency gains are being reported by users
- Support channel volume is normalizing
- The team’s conversations have shifted from survival to optimization

#### Build For The Long Term

- A centralized roadmap planning process is in place for future enhancements
- Automation is being layered in incrementally—don’t over-engineer before you’re stable
- Customization is being evaluated carefully to avoid technical debt
- Blue Sage PMO is engaged proactively in roadmap planning
- A dedicated internal team owns the LOS and its ongoing development