

PRINTABLE WORKSHEET

90-Day Digital Safety Rollout Worksheet

Turn the five-stage implementation framework into an accountable baseline, rollout, and evidence plan.

Use this worksheet with the interactive guide. Complete it as a team, record disagreements, and choose one improvement to test.

COMPANY	PROJECT / SITE	TEAM	DATE

Stages 1 and 2 - baseline and buying team

Canada: identify the province, territory, or federal jurisdiction and confirm the applicable review, record, and retention requirements.

PROMPT	NOTES
What current problem will this rollout change, and who owns it?	
Which workflows, projects, roles, and records are in scope or explicitly out?	
What are the current volume, completion time, quality, retrieval, and closure measures?	
Which legal, contractual, policy, security, retention, and review controls apply?	
Who represents field users, safety, operations, IT/security, finance, and executive sponsorship?	

Stages 3 and 4 - adoption and configuration

Design the release around the people who perform the work, then configure only what supports the intended outcome.

PROMPT	NOTES
Which crew, project, and high-frequency workflow will form the first release?	
What must work on shared devices, with gloves, in low connectivity, and across languages?	
Who will test, train, champion, support, and retire the old process?	
Which fields, states, permissions, notifications, offline behaviors, and reports are required?	
Which integrations are essential now, and which can wait until the core workflow is stable?	

Stage 5 - the 90-day evidence plan

Assign every measure an owner, a source, a review date, and a decision it can change.

PROMPT	NOTES
Days 1-30: completion, training coverage, support demand, sync failures, missing records, urgent workarounds	
Days 31-60: adoption by role and project, completion time, office re-entry, corrections, action ownership	
Days 61-90: baseline comparison, workflows retired, retrieval time, administrative capacity, integration quality	
Quarterly: permissions, retention, configuration, data quality, stakeholder feedback, cost, verified operating value	

Decision and expansion gate

PROMPT	NOTES
What evidence means continue, change, expand, pause, or stop?	
Who can make each decision, and on which date?	
Which unresolved risk or support need must be closed before expansion?	
Which next workflow becomes eligible only after the current release is stable?	

ACCOUNTABLE OWNER	30-DAY REVIEW	60-DAY REVIEW	90-DAY DECISION