Project Transition Plan

Project Name:	
Prepared by:	
Date (MM/DD/YYYY):	

Version History (insert rows as needed):		
Version	**Date (MM/DD/YYYY)**	**Comments**
1.0		

The Transition Plan is used to describe how deliverables of the project will be brought to full operational status, integrated into ongoing operations and maintained. Purpose: ensure that deliverables can be used effectively to produce the intended Business Value after project completion. Develop this plan during the Planning Phase and include it as part of your Project Management Plan.

Background

It is generally true that the purpose of any project is to implement one or more deliverables (e.g. product or service) that will be used by ongoing operations to generate a predefined Business Value (e.g. better customer support, faster time to market, cost savings). Business Value (BV) is realized after the project is complete. It is therefore necessary to plan and execute the project so that a firm foundation for BV realization is created.

Transition is all of the work done to create that foundation, e.g. implement project deliverables and create an effective support apparatus. However, if the intended level of BV is to be obtained, the following criteria must be met:

- *Deliverables must be of sufficient quality that they can be used effectively. Poor fitness for use or failure to meet requirements will almost always result in diminished or delayed BV realization.*
- *Users of project deliverables must be ready, willing and able to use them. This means that the work environment supports use of the deliverables (e.g. Standard Operating Procedures have been updated), users have accepted change in their workplace (e.g. use of different tools), and users have had adequate training. If users are unwilling or unable to use project deliverables, BV realization will be diminished or absent.*
- *Support of both deliverables quality and user capacity must continue for the life of the deliverables. If the deliverables become obsolete or if users lose the ability to use the deliverables (e.g. due to high turnover but not follow-on training), realization of BV will diminish over time.*

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1. Overview

1.1 Project Objectives

Project Objectives may be found in the Project Charter – reproduce them here.

1.2 Customer Information

Referencing the existing Stakeholder Profile, identify the intended users and the planned operating sites that will be involved in this transition. Provide a hyperlink to the Stakeholder Profiles document.

Link to Stakeholder Profiles document

1.3 Transition Plan Objectives

Briefly describe the objectives of this plan. Use any or all of the items listed below and add your own as needed.

- Ensure that deliverables are of sufficient quality to support full Business Value realization
- Ensure that the customer is fully trained and capable of effectively using the deliverables
- Ensure that the customer is willing to use the deliverables
- Ensure that the work environment will support effective use of deliverables
- Plan for a smooth transition from rollout to full operational status
- Identify staffing and training needs for system operation and maintenance
- Plan for ongoing updates to deliverables
- Plan for ongoing helpdesk operations
- Plan for ongoing QA oversight

1.4 Reference Documents

Identify all sources of information used to develop this plan. Provide hyperlinks to those documents or else state where they can be found.

1.5 Outstanding Issues
State any project planning issues or problems relevant to transition planning which are known as of this plan revision.

2. Transition Planning

2.1 Transition Schedule	
If you have already included the schedule for Transition in the main project schedule, indicate that here. If not, develop a detailed schedule for Transition and provide a hyperlink to it here. In this space, list all important Transition milestones and their dates. Sample milestones are provided.	
Link to Transition schedule	
Milestone	**Due Date**
Organizational Adoption	
Organizational Readiness Assessment complete	
Organizational Adoption Plan accepted	
Stakeholder Training Plan accepted	
Start of Marketing Campaign	
Product Delivery	
Rollout Plan accepted	
Installations complete	
Customer training complete	

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2.2 Roles and Responsibilities

List the names of those working on Transition here, along with their role and responsibility. Include both team members and stakeholders.

Name	Role	Responsibility

2.3 Risks to Transition

List primary risks to Transition here along with actions to be taken. Alternative: enter risks to Transition in the project Risk Register and perform a full risk analysis.

Description of risk	Actions to be taken

3. Stakeholder Support

3.1 Organizational Readiness

Organizational Readiness is a measure of an organization's ***ability*** *(not willingness) to embrace change. If you have performed an Organizational Readiness Assessment, provide a link to the results here and skip to section 3.2. If you intend to do an assessment but results are not yet available, indicate that here and skip to section 3.2. If there will not be an assessment, enter N/A and complete this section.*

Do you know if changes in the work environment are required before stakeholders can make the change (e.g. new location, new organizational structure, updated standard operating procedures or job descriptions)? If there are, do you know if the project team is responsible for making these changes? If either answer is NO, describe here what you will do to acquire the necessary information. Otherwise, enter YES.

If changes in the work environment are needed, list those changes here. For each, indicate who is responsible for doing the work. Add additional information where needed. Include these tasks in the project schedule.

Required Change	Responsible	Comments

3.2 Resistance to Change

*Resistance to Change reflects an **unwillingness** to adopt new tools, process or organizational structure. If you have produced an Organizational Adoption Plan (OAP), provide a hyperlink to it here and skip to section 3.4. If you intend to produce an OAP but have not yet done so, indicate that here and skip to section 3.4. If you will not be producing an OAP, enter N/A and complete this section.*

[redacted]

3.3 Stakeholder Training Plan (STP)

If you have a separate STP, provide a hyperlink here and skip to section 4.1. If you intend to produce one but it is not yet available, indicate that here and skip to section 4.1. If there will not be an STP, enter N/A and complete this section.

Describe your stakeholders' training requirements during the project here and indicate how you will satisfy them. Include all training tasks in the project schedule. Add new rows as needed.

Training Requirements	Training Action

[redacted]

4. Product Delivery

4.1 Rollout Plan

If you have a separate Rollout Plan, provide a hyperlink here and skip to section 5.1. If you intend to produce one but it is not yet available, indicate that here and skip to section 5.1. If there will not be a Rollout Plan, enter N/A and complete all of section 4.

4.2 Data Migration

Describe any data that you must migrate into the deliverable system product during Rollout.

List any special issues with regard to data reconstruction or the migration of historical data.
Describe your rollback process.

4.3 Testing

[redacted]

4.4 Installation

[redacted]

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4.5 Defect Reporting
Describe how users will report defects in project deliverables as they are rolled out (e.g. software defects; hardware failures).
What will you do if defects cannot be repaired by the end of Rollout?

4.6 Rollback Procedure
In the event of significant failure, will you be able to roll back to the original system? Describe your rollback procedure.
Describe your plans in the event of rollback failure

4.7 Stakeholder Communications
[redacted]

5. Maintenance Development

5.1 Maintenance Roles and Responsibilities		
Identify the roles and responsibilities associated with maintenance as well as the skill set needed to perform those functions. Key roles to identify include the primary business contact, maintenance team lead(s), key technical staff, customer or help desk support, documentation, training and other support staff and vendors who will continue to support an installed product.		
Maintenance Role	**Responsibilities**	**Skills required**

Define the project team's role (if any) as the maintenance team becomes active.		

5.2 Governance and Management Approach

[redacted]

5.3 Facilities

Describe the facilities that the maintenance team will require. This description may include office space, computing equipment, safety and security requirements, special power needs, cabling, room construction, etc. If facilities are already available, enter N/A

5.4 Hardware

Describe the hardware and associated documentation that the maintenance team will require. Include a description of any network or data communication requirements. If these are already available, enter N/A

5.5 Software

[redacted]

5.6 Release Process

Document the release process that the maintenance team will use. Refer to any Configuration Management standards that define an acceptable release, and indicate how Configuration Management will be applied by the maintenance team.

5.7 Budget

Provide an overview of the budget that will support maintenance (e.g. dollars per year, budget source, etc.). Provide a link to the appropriate budget documents or else identify where budget information related to maintenance activities may be found.

$ per year	Budget source	Applied to

5.8 Maintenance Team Activation

Describe the activation of the maintenance team. Will the Maintenance Team be activated during Rollout or after? If during rollout, what will their responsibilities be? How they will coordinate their activities with the project team. If activated after rollout, who will repair defects reported by users?

5.9 Post-Rollout Training

Describe the training requirements for maintenance staff. If there is a formal Training Plan, provide a hyperlink here.

5.10 Performance Measures and Reporting - SLA

Identify key performance measures for maintenance activities and for product or service performance. Include information on how measures will be captured and reported. If an SLA is available, provide a hyperlink to it here.

5.11 Problem Resolution

Specify the procedure for identifying, tracking, and resolving problems with the operational product.

Describe how stakeholder/customers will be involved in or informed about maintenance activities.

Describe key stakeholders and methods for communication where known.

5.12 Documentation Strategies

Describe documentation that will be routinely revised or produced such as reports; user, usage, problem and change information; product/service documentation. Include details on where documentation is stored and how it is accessed.

5.13 Adoption sustainability metrics

What metrics will be used to ensure that use of the solution is sustained? How often will you measure?

Will you survey stakeholders 3, 6, or 9 months after go live to ensure adoption?

How will you ensure adoption?

6. Business Value Measurement

6.1 Business Value

Reproduce the officially approved description of project Business Value here. This may be available in the Project Charter.

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6.2 Business Value Measurement

How will Business Value be measured after rollout? What specific metrics will be recorded?
Who will measure Business Value? How often or at what times will they do so?

[redacted]

6.3 Total Cost of Ownership

How will Total Cost of Ownership (TCO) be measured after rollout? What specific metrics will be recorded?
Who will measure TCO? How often or at what times will they do so?
Who will analyze the TCO and Business Value measurements to determine Return on Investment? Who will they report the results to?