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Project Transition Plan Template Rev. 1.2 November, 2011

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Project Transition Plan

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

Version H	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.

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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 Transitio	n				
List primary risks to Transition he project Risk Register and perform	ere along with action n a full risk analysis	ns to be taken. Altern	ative: enter risks to Transition in the		
Description of	of risk		Actions to be taken		
3. Stakeholder Support					
3.1 Organizational Re	eadiness				
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 environme doing the work. Add additional in			For each, indicate who is responsible for tasks in the project schedule.		
Required Chan	ge	Responsible	Comments		

Project Transition Plan Sample - for Evaluation Only 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.

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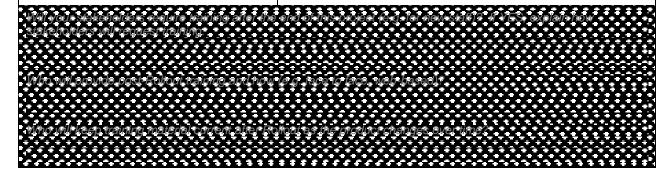
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3.3 Stakeholder Training Plan (STP)

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



4. Product Delivery

4.1 Rollout Plan

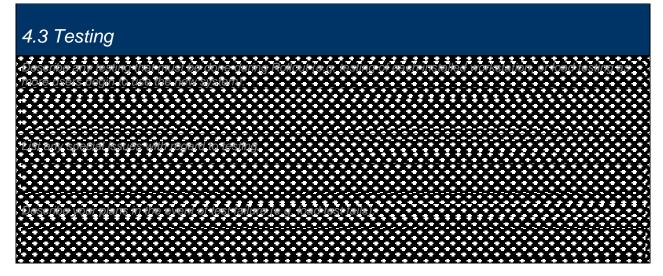
If you have a separate Rollout Plan, provide a hyperlink here and skip to section 5.1. If you intend to produce one but it is not yet available, indicate that here and skip to section 5.1. If there will not be a Rollout Plan, enter N/A and complete all of section 4.

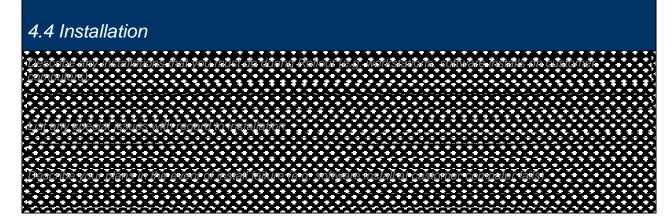
4.2 Data Migration

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

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





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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



5. Maintenance Development

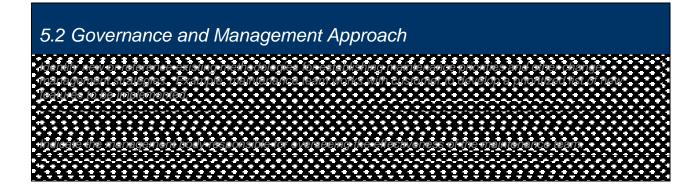
5.1 Maintenance Roles and Responsibilities

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

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



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 Passeutus seut seuturate turistas seutatas dus contraticione des la lacutatura transca, tes artificia seutura de la lacuta de lacuta de la lacuta de lacuta de la lacuta de lacuta de

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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



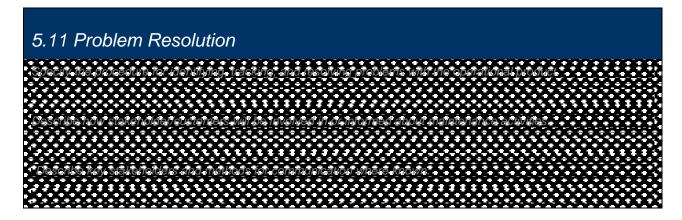
5.9 Post-Rollout Training



5.10 Performance Measures and Reporting - SLA

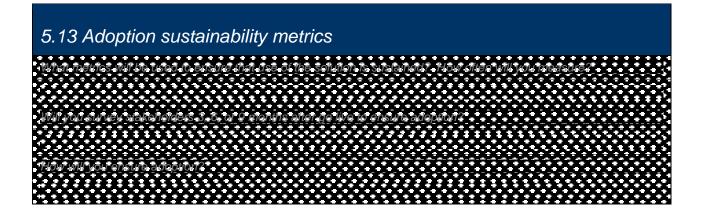
Identify key performance measures for maintenance activities and for product or service performance. Include information on how measures will be captured and reported. If an SLA is available, provide a hyperlink to it here.

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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.



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? All the hollowing state the Engage as Angles proposition and the positive of the proposition of the positive and the positive a

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?

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