TRANSITION PLAN TEMPLATE

In this template, instructions are included in italics. When you have completed the template and no longer need the instructions, delete them.

Provide a brief overview of the transition goals, any assumptions that the plan is based on, and any risks that have been identified that could severely limit your ability to complete the transition on schedule.

Goals:

Assumptions:

Risks:

Other:

Transition Team

List the members of the transition team, providing the name of the person who fulfills each roll.

Transition Role	Who
Transition Team Leader	[Name of Technical Project Manager]
Project Leader	[Name of Business Project Manager]
Transition Specialist	
Project Team	
Database Administrator	
Systems and Networking	
Production Support	
Desktop Support	
Help Desk	
OPS	
Platform Support	
Project Development	

Transition Process Tasks

List the tasks that must be accomplished during the transition process. Some tasks will be repeated for each deliverable—be sure to include each task for each deliverable. This list of tasks can then be given to the project manager to be included in the MS Project plan for the development project. The following table suggests tasks, roles for who is responsible for each task, and a general timeframe for when the task is due. You should replace the role names with actual names, and the general time with a specific due date, and change the text formatting back to regular text (select the text and press Ctrl+Spacebar to remove character formatting). You will probably also have additional tasks to add to the list.

The transition tasks include:

Task	Who's Responsible?	When Is It Due?
Coordinate transition planning meeting	*Technical Project Manager*	*Initiation*
Distribute project Initiation Plan or Project Plan	*Project Manager (business or technical)*	*Initiation*
Attend transition planning meeting	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Initiation*
Review development project schedule	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Initiation*
Review deliverables list to determine requirements	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Initiation*
Develop matrix of required resources/skills	*Technical Project Manager*	*Initiation*
Conduct skill gap analysis against all IS staff	*Training Coordinator, Production Support Manager*	*Initiation*

Task	Who's Responsible?	When Is It Due?
Identify project activities to be completed before transition can start	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Initiation*
Determine timeline	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Initiation*
Establish transition milestones	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Initiation*
Assign support staff to the application	*Production Support Manager*	*Ramp-up*
Determine actual training needed, based on gap analysis	*Training Coordinator, Technical Project Manager, Production Support Manager*	*Ramp-up*
Determine roles and responsibilities (such as collect, review, accept deliverables, resolve variances, etc.)	*Transition Specialist, Technical Project Manager, Business Project Manager*	*Ramp-up*
Assign evaluator for each transition deliverable	*Transition Specialist*	*Ramp-up*
Establish support expectations for IS	*Transition Specialist, Technical Project Manager, Business Project Manager, and Production Support Manager*	*Ramp-up*
Obtain access/privileges	*Technical Project Manager*	*Ramp-up*

Task	Who's Responsible?	When Is It Due?
Acquire software license agreements for production support	*Technical Project Manager and Configuration Manager*	*Ramp-up*

Develop training plans
 	
    Identify necessary training courses
 	
    Schedule classes
 	
    Identify necessary knowledge transfer activities
 	
    Determine measurable tasks to validate that knowledge transfer is acceptable
	Training Coordinator, Technical Project Manager, Production Support Manager	*Main Transition*

Notify business area(s) of production support procedures	*Production Support Manager*	*Go Live Gateway*
Notify C&C units of transition to production status	*Production Support Manager or Technical Project Manager*	*Go Live Gateway*
Establish new on-call lists	*Production Support Manager*	*Shakedown*
Move development documentation and code to production repository	*Technical Project Manager and Configuration Manager*	*Steady-State Gateway*
Transfer user group/steering committee leadership to production support	*Production Support Manager and Business or Technical Project Manager*	*Steady-State Gateway*

Training

Required Skill Levels

Estimate the necessary level of skill to support the application, in terms of business knowledge, application knowledge, and software knowledge. List the skills, making sure not to forget the system software knowledge required.

Skill	Level of Expertise	Availability Required	Degree of Applicability
Description of skill	*Trainee, moderate, expert, or explain what is necessary*	*Indicate where the skill must be available: On the team, in IS, in C&C, or in user area*	*Rate the applicability of the skill to the system, using a scale of 1-5, with 1=light and 5=heavy*

Training Needs

Based on the estimated skill levels, and some knowledge of the skill levels of the production support staff, estimate the training needs. List recommended knowledge transfer activities. List any courses that will be required, and include a schedule of when those courses are offered.

Training Plan

Provide a training plan, including a schedule for completing any necessary course work, and for knowledge transfer activities.

Resources

Production Support Resources

Estimate the resources required to support the application in steady-state production and during the shakedown period. Provide the estimate as both a head count, and an FTE count, for example: 2 people at 25-75% (1 FTE).

Transition Resources

Estimate the resources needed for the transition.

Communication Plan

Establish a schedule for transition team meetings, for transition reviews, and for reports to the development project team, the production support manager, and any other C&C units involved in the transition of this application. Determine how reports are to be made (at project status meetings, at project review meetings, through email, etc.). Use the project stakeholder table to determine who has a stake in the transition progress.

The following methods will be used to keep stakeholders and outside parties informed and involved in the transition process:

Stakeholder	Method of Communication	Frequency of Communication
Transition Team	Face-to-face informal meetings Transition Team Meetings	Daily Monthly before ramp-up, but weekly during transition
Project Team	Project Status Meetings	Weekly
Project Sponsor	Project Status Report	Monthly
C&C Director	Project Status Report	Monthly
Project Steering Committee	Project Status Report Project Status Meeting	Monthly On demand, when issues require it
Project Manager Team	Committee Meetings Global Issues Log	Semi-monthly On demand
End Users and other stakeholders	Project Status Report Transition Status Notification by email	Monthly When application reaches steady-state production
Outside Groups, such as vendors	Business letters	As needed

This table shows the categories of stakeholders. You should add the actual names for your project's stakeholders in each category. The communication methods and frequencies included in this table are recommended, but you may add additional communication techniques, or modify these if necessary.

Timelines and Milestones

Estimate the length of the transition period, and the extent of overlap with development. Also estimate the length of the expected shakedown period. Assign a production delivery date. Estimated dates for the milestones of Ramp-up, going live, and entering steady-state production should be included. In addition, include the dates for any expected outside training classes for support staff that will be required.