**Implementation Checklist**

**<Project Name or Release Name>**

When complete, delete all the blue instructions

The purpose of this checklist is to assist the project manager in leading the project team through the discussions and decisions that will be required for implementation of the release or system. This checklist is not meant to serve as a place to document the decisions, tasks, responsibilities, or schedules, but instead as a reminder for the topics to cover with the team

If the vendor is responsible for providing an implementation and/or transition plan deliverable, this checklist can be used to verify that the vendor’s plan covers all necessary information. If this is an NDIT build or the project manager is responsible for providing an implementation and/or transition plan, then decisions related to this checklist should be added to existing project documents. If the project manager wants to produce an independent document, an Implementation and Transition Plan template can be found on the PMO website.

# questions to consider

* What is the project team implementing? (The full system? A specific release? Certain functionality?)
* Will the system go live to all users at the same time?
* Will there be a mock go live?
* Will there be a pilot?
* What is NDIT’s involvement?

# items to note

* At least one month prior to go live, depending on the size of your project, determine detailed go-live tasks with the team If there is no implementation plan to document these, they can be added to the schedule, or an Excel spreadsheet, or Word table
* Determine roles and responsibilities during implementation If there is no implementation plan to document these, they can be added to the RACI in the project plan

# IMPLEMENTATION CHECKLIST

Multiple options are provided, choose the ones that are applicable to your project.

**General Communication**

[ ]  Work with change practitioner, if one is assigned

[ ]  Determine what communications you need to send to keep users and stakeholders informed

[ ]  Determine who will be authoring and sending communications

[ ]  Determine when communications should be sent and by what method

**Operational Setup**

[ ]  Communicate and incorporate organizational changes

[ ]  Review and communicate policy changes

[ ]  Communicate and review interim business process for Mock Go Live or Pilot Go Live

[ ]  Communicate and review issue identification and escalation

**User Setup**

[ ]  Set up all user accounts

[ ]  Validate user access at all security levels/groups

[ ]  Remediate user access issues

[ ]  Verify all users have workstations that meet minimum requirements, with appropriate configurations and correct browsers installed

**Training**

[ ]  Verify users have been trained

[ ]  Verify users have access to training materials for future reference

**Code Merge (merging code into previous releases)**

[ ]  Merge code into all appropriate environments (UAT, production, etc.)

[ ]  Merged code is validated and tested in all environments

**Code Freeze**

[ ]  Determine code freeze timeframe

[ ]  Define scope of code freeze

[ ]  Determine how defects are handled during code freeze

[ ]  Execute code freeze

**Change request if an NDIT-hosted system (1-2 weeks before Go Live)**

[ ]  Create Change in Service Management application

[ ]  Define justification

[ ]  Summarize implementation plan

[ ]  Summarize risk and impact analysis

[ ]  Summarize backout plan

[ ]  Summarize test plan

[ ]  Summarize who is impacted

[ ]  Determine if public notification is required and to which group (only people who have signed up will receive this)

**Notify Service Desk (at least 1 week before Pilot or Go Live)**

[ ]  Email Randy Jensen (rwjensen@nd.gov)

[ ]  Provide high-level information on what the system is

[ ]  Provide information on how system is accessed

[ ]  Provide information on where to send tickets if there is a problem (e.g., if they go to the vendor)

[ ]  Optional: meet with service team to demonstrate system at high level and explain what it does

**Notify Accounting – at Go Live for projects that require NDIT billing outside of hourly costs (e.g., servers)**

[ ]  Notify Brandee Rensch

[ ]  Provide project name and what service/product needs to be billed

[ ]  Include original quote if we provided one to the customer

**Mock Go Live or Pilot Data Conversion**

[ ]  Determine data conversion approach

[ ]  Determine preparation activities

[ ]  Convert and validate data

**Mock Go Live or Pilot Interfaces**

[ ]  Identify interfaces that will be active for Mock Go Live or Pilot

[ ]  Identify necessary environments

[ ]  Configure any necessary interface environments

[ ]  Validate interface configurations

**Mock Go Live or Pilot Site Support**

[ ]  Determine site support resources

[ ]  Determine how issues will be addressed, monitored, and escalated

[ ]  Determine how defects will be addressed and retested

**Mock Go Live or Pilot Cutover**

[ ]  Determine cutover timeline

[ ]  Develop detailed activities required for cutover and their dependencies

[ ]  Identify activity owners

[ ]  Identify decision points

[ ]  Finalize Mock Go Live or Pilot entry and exit criteria

[ ]  Communicate cutover plan

[ ]  Execute the cutover

**Mock Go Live or Pilot Entry Criteria (example)**

[ ]  Participants have been identified

[ ]  User setup activities are complete

[ ]  Participants have been trained

[ ]  Mock Go Live or Pilot cutover plan has been developed, reviewed, agreed-upon, and tested

[ ]  Mock Go Live or Pilot cutover activities are complete

[ ]  Mock Go Live or Pilot communications have been delivered

[ ]  Interface readiness activities are complete

[ ]  Data conversion preparation activities are complete

[ ]  Site support resources have been identified

[ ]  Situation room has been set up to begin resolving issues

**Mock Go Live or Pilot Exit Criteria (example)**

[ ]  Priority defects identified during Mock Go Live or Pilot have been resolved and retested

[ ]  Mutually-agreed-upon remaining defects not fixed during Mock Go Live or Pilot have been reviewed and there is a mutually-agreed-upon plan to resolve those defects

[ ]  Mock Go Live or Pilot lessons learned have been documented, reviewed, and incorporated into the implementation plan

**Mock Go Live or Pilot Rollback Plan**

[ ]  Identify rollback triggers

[ ]  Define rollback procedures

[ ]  Determine rollback activities and owners

**Go/No Go Decision**

[ ]  Determine go/no go decision process

[ ]  Determine go/no go decision points

[ ]  Identify who will make the go/no go decision

[ ]  Determine what information will be needed for the go/no go decision

**Data Conversion**

[ ]  Determine data conversion approach

[ ]  Determine preparation activities

[ ]  Convert and validate data

**Interfaces**

[ ]  Identify necessary environments

[ ]  Configure any necessary interface environments

[ ]  Validate interface configurations

**Site Support**

[ ]  Determine site support resources

[ ]  Determine how issues will be addressed, monitored, and escalated

[ ]  Determine how defects will be addressed and retested

**Cutover**

[ ]  Determine cutover timeline

[ ]  Develop detailed activities required for cutover and their dependencies

[ ]  Identify activity owners

[ ]  Identify decision points

[ ]  Finalize Go Live entry and exit criteria

[ ]  Communicate cutover plan

[ ]  Execute the cutover

**Go Live Entry Criteria**

[ ]  All agreed-upon fixes and or system updates

[ ]  Training activities are complete

[ ]  User setup activities complete

[ ]  Cutover plan has been developed, reviewed, agreed-upon, and tested

[ ]  Cutover activities are complete

[ ]  Interface readiness activities are complete

[ ]  Data conversion preparation activities are complete

[ ]  Problem resolution process identified

[ ]  Communications have been delivered

**Rollback Plan**

[ ]  Identify rollback triggers

[ ]  Define rollback procedures

[ ]  Determine rollback activities and owners