**Project Name**

**Implementation and Transition Plan**

|  |  |
| --- | --- |
| **Author:** | **xxx** |
| **Version:** | **xxx** |
| **Revision Date:** | **xxx** |



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Document Control

Once the project plan is formally approved, changes must be requested utilizing the Integrated Change Control process. Upon approval of requested modifications, the version number will increase by one and the following information documented in the table below:

| **Version** | **Date Applied** | **Change** |
| --- | --- | --- |
|  |  |  |
| 1.0 | x/xx/xx | Plan formally approved |
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# Introduction

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The Implementation and Transition Plan discusses how to transition the project from the project team to the organization (e.g., post-implementation activities, organizational change, end-user support, and any plans for ongoing training).

## Purpose of This Document

The purpose of this plan is to discuss how the solution will be implemented and to transition the solution from the project team to the business staff.

## Project Description

Provide a high-level description of the project: what the project will produce, what entities are involved, how the project was approached (phases, agile, multiple releases, etc.), and the overall timeline and budget.

This project will…

## Acronyms/Abbreviations

Add acronyms/abbreviations that are specific to your program or project. This section is optional based on how the stakeholders will be reading the document. If your stakeholders will be reading electronically, you may choose to delete this section.

Ones already used in this template have been added below. Fill in change as applicable.

| **Acronym/Abbreviation** | **Description** |
| --- | --- |
|  |  |
| COTS | Commercial Off-the-Shelf |
| NDIT | North Dakota Information Technology |

## List of Related Documents

This list would cover any other documents related to the implementation and transition of the solution. This list may include the project plan, project schedule, statement of work, analysis and design documents, business process models, architecture or system diagrams, and the training plan.

The following documents are important to this project and provide additional information for review: *(*If your document name is a hyperlink and most stakeholders will be reading this plan electronically, you may choose to delete the Version/Date column)

Table 1: Related Documents

| **Document Name** | **Version/Date** |
| --- | --- |
|  |  |
| xx | xx |
|  |  |
|  |  |

# Implementation Plan

## Implementation Assumptions and Constraints

### Assumptions

Assumptions are factors that, for planning purposes, are considered to be true, real, or certain without proof or demonstration.

The project team has the following assumptions about the implementation:

* xxx
* xxx

### Constraints

Constraints are restrictions on the overall project or the project work that may drive decisions and priorities.

The implementation has the following constraints:

* xxx (Example: are there any factors requiring implementation at a certain time?)
* xxx

## Technology Environment

For technology solutions, describe the system environments (including the servers, applications, ancillary services, databases, security, and network). If this project does not involve technology, this section can be deleted.

xx

## Implementation Strategy

Describe how the solution will be migrated from the vendor and/or project team to the business staff and maintenance team.

xx

### Implementation Team

Identify the roles associated with implementation, as they may differ from the previous project roles. Key roles to identify include the technical, business, and support staff.

The following are members of the implementation team:

Table 2: Implementation Team

| **Name** | **Implementation Team Role** |
| --- | --- |
|  |  |
| xxx | xxx |
| xxx | xxx |
| xxx | xxx |
| xxx | xxx |

### Implementation Tasks

Describe the implementation schedule and what key tasks or work is required to implement the solution. If the project schedule details these activities, you may reference the project schedule instead.

The following tasks are required to implement the solution:

Table 3: Implementation Tasks

| **Task Description** | **Resource/Role Assigned** | **Start Date** | **Finish Date** |
| --- | --- | --- | --- |
|  |  |  |  |
| xxx | xxx | xx/xx/xxxx | xx/xx/xxxx |

### Implementation Entry and Exit Criteria

#### Entry Criteria

The following criteria are required for entry into the implementation phase:

* xxx
* xxx

#### Exit Criteria

The following criteria are required for exit of the implementation phase (acceptance of the implementation):

* xxx
* xxx

### Contingency Plan

Describe the contingency plan if anything goes wrong during the implementation.

In the event of a problem…

## Training Plan

Describe any technical or business training activities that are required for implementation that may not already be covered in the overall training plan or may need further detail than in the training plan. If all training activity is covered elsewhere, this section can be deleted.

xxx

## Communication Plan

Describe how project team members and stakeholders will be notified of progress, changes, issues, or use of a contingency plan.

Progress will be reported to stakeholders and team members by…

If an issue arises during the implementation, stakeholders and team members will be notified by…

If there are changes to the implementation or if a contingency plan goes into effect, stakeholders and team members will be notified by…

## Documentation

Describe the solution or business documentation required for implementation, where that information is stored, and if it requires special access. Describe where the documentation needed for maintenance will be stored (as this may be a different location).

The following documentation will be required for implementation:

Table 4: Implementation Documentation

| **Documentation** | **Location** |
| --- | --- |
|  |  |
| xxx | xxx (reminder to note if access needs to be granted and by whom) |
| xxx | xxx |
| xxx | xxx |
| xxx | xxx |

# Transition Plan

This section describes how the business process changes will be implemented and the project team will transition the solution to the business.

## Transition Assumptions and Constraints

### Assumptions

Assumptions are factors that, for planning purposes, are considered to be true, real, or certain without proof or demonstration.

The project team has the following assumptions about the transition:

* xxx
* xxx

### Constraints

Constraints are restrictions on the overall project or the project work that may drive decisions and priorities.

The transition has the following constraints:

* xxx (Example: are there any factors requiring transition at a certain time?)
* xxx

## Transition (Business Migration) Strategy

What are the steps needed for the business to go live with the product? Include who will support the system directly post-project and if there is a transition to a future support role.

This is not just technology – it would be for all areas. How are we going to handle the maintenance aspect of it? How is the vendor involved? Think about if NDIT or other business staff need to support this solution in any way. Does the business understand the escalation path for problems?

xxx

### Transition Team

Identify the roles associated with the transition, as they may differ from the previous project roles. Key roles to identify include the business and support staff.

The following are members of the transition team:

Table 5: Transition Team

| **Name** | **Transition Team Role** |
| --- | --- |
|  |  |
| xxx | xxx |
| xxx | xxx |
| xxx | xxx |
| xxx | xxx |

### Transition Tasks

Describe the transition schedule and what key tasks or work is required to transition the solution to the business staff. If the project schedule details these activities, you may reference the project schedule instead.

Are service level agreements and disaster recovery plans in place? Do any existing disaster recovery plans need to be updated to include this solution? What are the tasks and responsibilities associated with these?

Does documentation need to be moved to a new repository? Does support staff need to be assigned? Does the business staff need to be notified of the support procedures?

The following tasks are required to implement the solution:

Table 6: Transition Tasks

| **Task Description** | **Resource/Role Assigned** | **Start Date** | **Finish Date** |
| --- | --- | --- | --- |
|  |  |  |  |
| xxx | xxx | xx/xx/xxxx | xx/xx/xxxx |

### Transition Entry and Exit Criteria

#### Entry Criteria

The following criteria are required for entry into the transition phase:

* xxx (Example: sponsor has accepted the implementation)
* xxx

#### Exit Criteria

The following criteria are required for exit of the transition phase (acceptance of the implementation):

* xxx (Example: post-production support period has ended)
* xxx

### Contingency Plan

Describe the contingency plan if anything goes wrong during the transition.

In the event of a problem…

## Training Plan

Describe any use or support training activities that are required for implementation that may not already be covered in the overall training plan or may need further detail than in the training plan. If all training activity is covered elsewhere, this section can be deleted.

xxx

## Communication Plan

Describe how project team members and stakeholders will be notified of progress, changes, issues, or use of a contingency plan.

Progress will be reported to stakeholders and team members by…

If an issue arises during the transition, stakeholders and team members will be notified by…

If there are changes to the transition or if a contingency plan goes into effect, stakeholders and team members will be notified by…

## Documentation

Describe the solution or business documentation required for transition, where that information is stored, and if it requires special access.

The following documentation will be required for transition:

Table 7: Transition Documentation

| **Documentation** | **Location** |
| --- | --- |
|  |  |
| xxx | xxx (reminder to note if access needs to be granted and by whom) |
| xxx | xxx |
| xxx | xxx |
| xxx | xxx |