



<Project Name> Transition Plan

Version X.XX

Instructions to the Author:

This is a template for developing a project Transition Plan.

The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values and information specific to the project.

Blue text enclosed in boxes provide instructions to the document author, or describes the intent, assumptions, and context for the content included in this document. This instructional text should be removed from the final document to make the plan more readable.

Text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a project.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as required to support a specific project. The information and outline is a suggestion to assist in developing project documents; they are not mandatory formats. The author should tailor the content of the document to fit the project that this work product will support.

The Transition Plan describes how a project solution or system will be deployed, installed, and transitioned into an organization's operations. The plan contains an overview of the system, a brief description of the major tasks involved in the implementation, the overall resources needed to support the implementation effort (such as hardware, software, facilities, materials, and personnel), and any site-specific implementation requirements.

The plan may be initially drafted in the planning phase and finalized near the close of the project development or execution phase.

Section	Use	Section	Use
Introduction	Required	System/Solution Integration	Optional
Purpose	Required	Transition Milestones	Required
Constraints and Dependencies	Optional	Transition Communications	Required
Roles and Responsibilities for Planning and Transition	Required	Situation Management	Required
Business Planning	Optional	Contingency Plans	Optional
Training	Optional	Roles and Responsibilities for Operations	Required
Documentation	Optional	Transitional Operations	Optional
Hardware, Software, Equipment	Required	Approval	Required

Remove this page from the final document.

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Revision History

Date	Version	Author(s)	Notes
1/1/2018	0.01		

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Introduction

REQUIRED: Provide a brief introductory statement defining the purpose of the Transition Plan.

Remove this instruction text from the final document.

Transition is an essential part of the project planning process. A Transition Plan is a comprehensive list of objectives, assignments, and itineraries needed to fulfill the delivery of a project solution. Transition plans require a great deal of preparation and research before they are executed.

Purpose

REQUIRED: Provide a brief introductory statement defining the purpose of the Transition Plan.

Remove this instruction text from the final document.

The purpose of the <PROJECT NAME> Transition Plan is to identify the constraints, dependencies, roles, and tasks involved in transition planning, implementation, and transition to operations.

Constraints and Dependencies

OPTIONAL: lists the transition assumptions, constraints, and dependencies that can influence the execution of the transition. Transition assumptions are statements that are considered true, real, or certain, without proof or demonstration. Transition constraints are restrictions or limiting factors that could affect project performance such as resources, schedule, scope, or quality. Transition dependencies are activities that can come before (predecessor) or after (successor) activities in the transition schedule.

Remove this instruction text from the final document.

The assumptions, constraints, and dependencies identified as potential impacts to the project are

Type <i>(Assumption, Constraint or Dependency)</i>	Description
E.g. Assumption: SME Availability	The system must be installed, in production, and validated before the beginning of the new fiscal year.
E.g. Constraint: Time	The system must be installed, in production, and validated before the beginning of the new fiscal year.
E.g. Dependency: Deployment Testing	The supplier must satisfactorily complete deployment testing before the implementation can start.

Transition Planning

Roles and Responsibilities for Planning and Transition

REQUIRED: Identify the roles and responsibilities of all the individuals required in the planning of the transition of the solution.

Remove this instruction text from the final document.

The following personnel will be members of the transition planning team with the listed roles and responsibilities.

Name/Title	Role	Implementation Planning Responsibility

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Name/Title	Role	Implementation Planning Responsibility

Business Planning

OPTIONAL: Provide an overview of the business planning such as process or policy changes that may occur with the transition of the solution. To be effective, such changes must be identified, documented, and communicated. This section may include a link to the Change Management Plan. In certain projects, this section may be sufficient to document planned business processes that may be changing as a part of the solution transition.

Remove this instruction text from the final document.

The following business processes will be impacted by the transition and that impact will be addressed as follows:

Business Process	How Addressed

Training

OPTIONAL: Estimate the training requirements for users, operational staff, and support staff (including Help Desk support) in business process changes to support the deliverable system. This will often include a link to the Training Plan. In certain projects, this section may be sufficient to document training planned as a part of the solution transition.

Remove this instruction text from the final document.

Documentation

OPTIONAL: List any documentation needed to support the solution. These documents may include support issues, tracking logs, training plans, deployment schedules, issue escalation plans, SOPs, etc.

Remove this instruction text from the final document.

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Hardware, Software, Equipment

REQUIRED: Describe any hardware, software, and associated documentation required to support the deliverable system. This may include network, data communication, database platforms, operating systems, etc.

Remove this instruction text from the final document.

System/Solution Integration

OPTIONAL: Describe what components are integrated at each step of the transition and describe what requirements are covered. If applicable, link the plan to the goals and objectives so the stakeholders can understand each of the integration steps. This section may include or link to a Visio diagram to illustrate system integration.

Remove this instruction text from the final document.

Transition Milestones

REQUIRED: List the major milestones which will be monitored, measured, and will indicate a successful solution transition.

Remove this instruction text from the final document.

#	Milestone	Date
1		
2		
3		
4		
5		

Transition Communications

REQUIRED: Describe the communication plan for the transition period. Throughout the project, the project team must communicate with the impacted agencies and/or stakeholders. This section may link to the Project Communication Plan and/or Matrix. In certain projects, this section may be sufficient to document communications planned as a part of the solution transition.

Remove this instruction text from the final document.

Situation Management

REQUIRED: Describe any identified transition planning issues, roll-back plans, or potential problems that may arise during the transition of the solution. Specify the procedures that will be followed for identifying, tracking, resetting, and/or resolving situations as they develop during transition.

Remove this instruction text from the final document.

Contingency Plans

OPTIONAL: Describe any contingency plans, their owner, and the person who can authorize their application should the need arise.

Remove this instruction text from the final document.

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Roles and Responsibilities for Operations

REQUIRED: Identify the roles and responsibilities of all the individuals who will be involved in the post-transition operations.
Remove this instruction text from the final document.

The following personnel are the post-transition operations team with the listed roles and responsibilities.

Name/Title	Role	Implementation Responsibility

Transitional Operations

OPTIONAL: Define any aspect of operations that needs to be handled differently during a defined transition period before, during, or after system implementation. Transition operations need to include Help Desk support in reference to the transition phase and how the support may have to change for the transition period. Standard Operating Procedures (SOP) need to be considered if new SOPs are to be created or if existing SOPs are to be revised because of the transition. Also, consider any other business processes, as well as infrastructure, when defining the operations of the transition.
Remove this instruction text from the final document.

The following business processes will require temporary changes over the listed time.

Business Process	Start Date	End Date	Assigned Owner

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Approvals

REQUIRED: Identify by name, title, and signature the individuals agreeing to authorize expenditure of organizational resources to accomplish the project activities outlined in this Transition Plan. At a minimum, the plan should be signed by the Project Manager, the Project Sponsor, and, if applicable, the Executive Sponsor.

Remove this instruction text from the final document.

Role	Name & Title	Signature	Date

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APPENDIX A: Transition Readiness Assessment Checklist

Mark each readiness criteria as YES/NO. Mark criteria not applicable to the project as NA. Add criteria to the checklist, as required.

Criteria	YES/NO/NA
1. Are system requirements documented?	
2. Have system requirements been reviewed and approved by the designated approvers?	
3. Has the system design/configuration been reviewed and approved by the designated approvers?	
4. Are software requirements documented?	
5. Have software requirements been reviewed and approved by the designated approvers?	
6. Has the website design been reviewed and approved by the designated approvers?	
7. Is there a Requirements Traceability Matrix indicating traceability between requirements, design, and testing?	
8. Do test planning documents that describe the overall planning efforts and test approach exist?	
9. Is testing, as specified in the test planning documents, complete?	
10. Are test results documented?	
11. Is product/website defect-free?	
12. Have all remaining defects been documented?	
13. Is product acceptance sign-off (e.g., Final Acceptance) complete?	
14. Is the product in compliance with documented security standards?	
15. Have security activities been implemented or completed?	
16. Have planned configuration audits been executed?	
17. Have configuration audit results been documented?	
18. Have planned data creation/conversion activities been executed, or are they on schedule to be completed as planned?	
19. Have planned training activities been executed, or are they on schedule to be completed as planned?	
20. Are documents to be produced for aiding in installation, support, or use of the product complete, published, and distributed, or are they on schedule to be completed, published, and distributed prior to deployment?	
21. Are transition to support activities complete, or are they on schedule to be completed as planned?	

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22. Are activities for notifying stakeholders (clients/administration) of the release on schedule to be completed as planned?	
23. Are activities to enable the operation and maintenance of the product on schedule to be completed as planned?	
24. Have site preparation activities been completed?	
25. If the project requires purchased application software products, are all license agreements complete?	
26. If the project requires purchased application software products, are all maintenance agreements in place and documented?	
27. If the project requires purchased hardware products, have those items been installed and tested?	
28. If the project requires purchased hardware products, are all maintenance agreements in place and documented?	
29. Is the production environment staged and prepared for release of the product for operational use?	
30. Have Help Desk support been updated or creating for the product/system?	
31. Have all applicable SOPs been updated or creating?	
32.	
33.	