Business Transition Planning checklist

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| **Project Name:** | **Project Number:** | **Prepared by:** | **Date:** |
|  |  |  |  |
| **Customer:** | **Business Unit:** | **Contact Name:** | **Project Type (Standard/Complex):** |
|  |  |  |  |

**INTRODUCTION**

Press F1 for Field Help.

*The Transition Plan describes the purpose of the transition, the available transition support resources, and operation scenarios for the transition.*

**A. General Information**

The components of the transition plan are shown below. Add or refer to existing documents as appropriate.

**B. Overview**

Describe the purpose of the transition plan, and the organization of the document.

**C. Objectives**

Briefly describe the business objectives of the system to which this document applies.

**D. System Description**

Briefly describe the system and the functions it is intended to perform. Identify the intended users and the planned operating sites.

**E. Plan Objectives**

Briefly describe the objectives of this plan, e.g., scheduling the transition from acceptance testing to full operational status, identifying staffing and training needs for system operation and maintenance, planning for data migration, etc.

**F. References**

Identify any sources of information used to develop this plan. Include other project documents, such as the Requirements Specification or the Project Plan.

# G. Outstanding Issues

State any project planning issues or problems relevant to transition planning which are known as of this plan revision.

# Software Support Resources

**H. Facilities**

Describe the facilities needed to support the deliverable software. This description may include safety and security requirements, special power needs, cabling, room construction, etc.

**I. Hardware**

Describe the hardware and associated documentation needed to support the deliverable software. Include a description of any network or data communication requirements.

**J. Software**

Describe any software and associated documentation needed to support the deliverable software. This may include database platforms, compilers, operating systems, utilities, etc.

**K. Documentation**

List any additional documentation needed to support the deliverable software.

# L.Personnel

Describe the personnel needed to accomplish the transition, maintenance, and support of the deliverable software, including the anticipated number of personnel, the types and levels of skills and expertise, and any necessary security clearances. Define the project team’s role during the transition period.

# M. Training

Estimate the training requirements for users, operational staff, and support staff.

# Operational Scenarios

Develop and describe detailed operational scenarios to be performed by the operational support staff, maintenance staff, and users. Explain how each scenario will impact transition planning, and describe any specific transition procedures that result from these scenarios.

# Transition Planning

**N. Release Process**

Document the release process for the deliverable software. Refer to any Configuration Management standards that define an acceptable release, and indicate how Configuration Management will be applied to the operational software product.

**O. Data Migration**

Describe any data that must be migrated into the deliverable software product. List any special issues with regard to data reconstruction or the migration of historical data.

# P. Problem Resolution

Specify the procedure for identifying, tracking, and resolving problems with the operational software product.

**Q. Transition Schedule**

Develop a detailed schedule for transition. Include a breakdown of roles and responsibilities. Address transition through the development, operation, maintenance, and support phases of the software product. Note critical time dependencies on the software support products listed in this document.