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Project Transition Checklist
Rev. 1.2 November, 2011

Sample - for Evaluation Only

Project Transition Checklist

Project Name:	
Prepared by:	
Date (MM/DD/YYYY):	

Version History (insert rows as needed):		
Version	Date (MM/DD/YYYY)	Comments
1.0		

<It is generally true that the purpose of any project is to implement one or more deliverables (e.g. product or service) that will be used by ongoing operations to generate a predefined Business Value (e.g. better customer support, faster time to market, cost savings). Business Value (BV) is realized after the project is complete. It is therefore necessary to plan and execute the project so that a firm foundation for BV realization is created.

Transition is all of the work done to create that foundation, e.g. implement project deliverables and create an effective support apparatus. However, if the intended level of BV is to be obtained, the following criteria must be met:

- Deliverables must be of sufficient quality that they can be used effectively. Poor fitness for use or failure to meet requirements will almost always result in diminished or delayed BV realization.
- Users of project deliverables must be ready, willing and able to use them. This means that the work environment supports use of the deliverables (e.g. Standard Operating Procedures have been updated), users have accepted change in their workplace (e.g. use of different tools), and users have had adequate training. If users are unwilling or unable to use project deliverables, BV realization will be diminished or absent.
- Support of both deliverables quality and user capacity must continue for the life of the deliverables. If the deliverables become obsolete or if users lose the ability to use the deliverables (e.g. due to high turnover but not follow-on training), realization of BV will diminish over time.

The Transition Checklist is used to ensure that the project team takes all steps necessary to meet the above criteria. It should be reviewed far enough in advance of implementation that any deficiencies in planning or execution can be resolved.>

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Review this checklist with the Project Team. Indicate the status of each question with Y (yes) or N (no). Provide sufficient information in the comments to support any actions which may be necessary. If needed, file Change Requests for updates to the project management plan.

	Y or N	Comments
1. People		
Is there a list of intended users (or groups or departments) of the new system?		
Are all locations that will use the new system known?		
Has there been confirmation that the staff needed to carry out Transition will be available?		
Is there a Sponsor available to support the Operation & Maintenance phase?		
Are Roles & Responsibilities defined for Transition? For the Operation & Maintenance phase? For example: <ul style="list-style-type: none">• primary business contact• maintenance & operations team lead(s)• key technical staff• customer or help desk support• documentation, training and other support staff• vendors who will continue to support an installed product		
Are all groups who will be involved in support and maintenance aware of their role?		
Is there an accepted formal release process for project deliverables to the Operation & Maintenance phase?		

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<p>Is the impact of new product releases on original operations known and planned for? (if applicable)</p> <ul style="list-style-type: none"> • Will software or hardware updates require downtime? • Is there planned capacity to support multiple versions of the same product? <p>Are the intended users of project deliverables trained to use them?</p> <p>Has the work environment been modified to enable optimum use of project deliverables? (e.g. update standard operating procedures)</p>		
<p>2. Planning</p>		
<p>Are the objectives of Transition clear?</p>		
<p>Is there a written plan for Transition?</p>		
<p>Is there a list of all unresolved issues related to Transition?</p>		
<p>Is there a list of all known risks related to Transition, and a plan for dealing with them?</p>		
<p>Do you know what facilities will be required for Transition to take place? For example:</p> <ul style="list-style-type: none"> • office space • manufacturing equipment • computers and related software • security systems • special power needs • network and communication facilities 		

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<p>Do you know what specific processes will be required for Transition to take place? Do you have the necessary tools and resources? For example:</p> <ul style="list-style-type: none">• Configuration Management• Change Control• Software update• Helpdesk• Defect reporting• Ongoing training• Ongoing data transfers or data migrations• Routine data archive• Data backup• Auditing		
<p>Does the transition team have the tools they need (e.g. Software? Equipment?)</p>		
<p>Is a rollback procedure available in the event of a rollout failure?</p>		
<p>Is budget approved to support transition?</p>		
<p>Is there a formal and approved project schedule for the transition period?</p>		
<p>Does the schedule extend far enough into the operation and maintenance phase to ensure effective integration into ongoing operations?</p>		
<p>Is the schedule based on an approved WBS?</p>		
<p>Are roles and assignments included in the schedule?</p>		
<p>Is the work of customers included in the schedule (e.g. training, data entry, testing, etc.)?</p>		
<p>Are there enough milestones to allow adequate measurement of progress?</p>		
<p>Are dependencies between Transition and other organizational work known and indicated on the schedule?</p>		

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3. Documentation		
Do you know what specific documentation is required for Transition to take place? For example: <ul style="list-style-type: none">• Revised Standard Operating Procedures• Revised job descriptions• Service Level Agreement• Training documentation		
Is the location of documentation known to those who need it?		
Is the written Transition Plan available to the staff members who will carry it out?		
Is there agreement about who has the authority to change, copy and/or distribute documentation?		
Is budget information available to those who need it?		
Is budget authority available to those who need it?		
Are Transition-related documents readily available to the transition team?		

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4. Training		
Are the training requirements for users, operational staff, and support staff known?		
Is there is a formal Training Plan?		
Are the training requirements for the Operation & Maintenance phase known?		
Is it clear who has responsibility for keeping training requirements up to date?		
Is it clear who has responsibility for identifying those who need training (e.g. new employees, new customers, anyone affected by a significant product change)?		
Is it clear who is responsible for ongoing training delivery?		
5. Performance		
Has provision been made for ongoing measurement of new system performance?		
Are performance targets documented?		
Are the tools and staff available for ongoing measurements?		
Is it clear who is responsible for ongoing performance measurement?		
Is it clear who will evaluate and act on the results of system performance measurements?		
6. Sustainability		
Is there or will there be a system in place for identifying, tracking, and resolving problems with the operational system product?		

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Is it known how user issues will be prioritized?		
Is there agreement on how user change requests will be dealt with?		
Is there agreement about how communication with the user community will be managed?		
Does the Organizational Adoption Plan extend into the Operation and Maintenance Phase?		
Is there agreement on metrics of organizational adoption of new products and/or processes?		
Is there agreement on who will measure organizational adoption of new products and/or processes?		
Is there agreement on what tools will be used to measure organizational adoption?		
Is there agreement on how often measurements of organizational adoption will be taken?		
Is it clear who will evaluate and act on the results of organizational adoption measurements?		

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7. Ongoing QA oversight		
Has the QA function been defined for Transition?		
Is there a formal and accepted QA plan?		
Has the role of QA been defined for the Operation and Maintenance phase?		
Have individuals been assigned to the QA role for Transition?		
Is there agreement on who will accept and act on QA reports on Transition?		
8. Business Value		
Is there an updated estimate of project Business Value?		
Have Business Value measurement procedures been approved.		
Have Business Value metrics been chosen?		
Is it known who will be responsible for measuring Business Value?		
Is it known who will analyze Business Value metrics data?		
Is it known who will act on Business Value analysis data?		
Is there an updated estimate of the project's Total Cost of Ownership (TCO)?		
Is it known who will measure ongoing operations and maintenance costs?		
Is it known how ongoing operations and maintenance costs will be measured?		