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Project Transition Checklist

Reviewers

Department	Name/Title

The departments and/or individuals listed above should be notified in advance and given a sufficient time period to review this document. The Project Team determines requirements for approval according to the scope of the project.

Modification History

Revision	Date	Originator	Comments
1			

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

The Project Transition Checklist is used to ensure that deliverables of the project will be brought to full operational status, integrated into ongoing operations and maintained in a sustainable manner.

	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 in the Operation & Maintenance phase?		
Is the impact of new product releases on ongoing operations known and planned for?		

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For example: <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?		
2. Planning		
Are the objectives of Transition clear?		
Is there a written plan for Transition?		
Is there a list of all unresolved issues related to Transition?		
Is there a list of all known risks related to Transition, and a plan for dealing with them?		
Do you know what facilities will be required for Transition to take place? For example: <ul style="list-style-type: none">• office space• manufacturing equipment• computers and related software• security systems• special power needs• network and communication facilities		
Do you know what specific processes will be required for Transition to take place? For example: <ul style="list-style-type: none">• Configuration Management• Change Management• Software update• Helpdesk• Issue resolution• Ongoing training• Ongoing data transfers or data migrations• Routine data archive• Data backup• Auditing		
Is budget approved to support Transition?		
Is there a formal and approved project schedule for the Transition period?		
Does the schedule extend far enough into the Operation and Maintenance phase to ensure effective integration into ongoing		

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operations?		
Is the schedule based on an approved WBS?		
Are roles and, where possible, assignments included in the schedule?		
Is the work of customers included in the schedule (e.g. training, data entry, testing, etc.)?		
Are there enough milestones to allow adequate measurement of progress?		
Are dependencies between Transition and other organizational work known and indicated on the schedule?		
3. Documentation		
Do you know what specific documentation is required for Transition to take place? For example: <ul style="list-style-type: none">• Standards documents• Data lists• 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 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?		
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?		

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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?		
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 Change Management 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?		

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Is it clear who will evaluate and act on the results of organizational adoption measurements?		
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?		