

Organisation [Name]

Department [Name]

Transition Plan

**<Project Name>**

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<*The PM² Methodology originated from the European Commission. Open PM² provides many guidelines and templates to facilitate the management and documentation of your projects.>*

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| *<These notes should be deleted in the final version :>***Notes for Templates:*** Text in <orange>:has to be defined.
* *Text in <blue>:* guidelines and how to use the Template. Should be deleted in the final version.
* Text in green: can be customised. Should be recolored to black in the final version.
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# Introduction

The objectives of the Transition Plan are:

* To identify and document the transition goals.
* To ensure the smooth transition of the project’s deliverables from the "project mode" to the "operations mode".
* To identify the pre-requisites for rolling out the project deliverables.
* To prepare the transition of the responsibility for the deliverables of the project from the project team to the client’s performing organization.

# Transition Goals and Activities

## Goals

*<Identify the specific transition goals.>*

## Prerequisites

*<Document the prerequisites of what must be completed before the transition can start.>*

*<Define what must be achieved in order to consider the transition successfully completed.>*

## Timing and Milestones

*<Determine transition timeline and transition milestones. Estimate the length of the transition period, and the extent of overlap with other project development activities.>*

*<Develop a high level schedule for all transition activities.>*

## Activities

*<Identify all transition activities that must be accomplished during the transition process.>*

*<Note that some tasks may be repeated for each deliverable (or for each release). Make sure to include each task for each deliverable (or release).>*

*<You can use the table below to document the main transition activities.>*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activities Description** | **Estimated Effort** | **Start-End Dates** | **Resource** | **Other Comments** |
|  |  |  |  |  |

*<Don't forget that the activities described in this section can be further broken down, detailed and scheduled in the overall Project Work Plan (PWP). They should be controlled and managed as part of the project activities.>*

## Responsibilities

*<Identify the roles and responsibilities of the resources involved in all aspects of the transition process.>*

## Coordination Aspects

*<Determine any coordination needs between teams or projects.>*

# Communication

*<Ensure that a formal announcement of the transition to production is taken place>.*

*<Identify the communication goals of the transition process. Make sure that you coordinate these goals with any communication goals described in the Business Implementation Plan.>*

*<Note that all project communication activities should be consolidated and documented in the overall Communications Management plans or in the relevant section of the Project Handbook (PHB)>*

# Specific Transition Activities

*<Describe and plan any project specific transition activities. You can use the sections below (if applicable to your project, otherwise delete, merge or add relevant sections.>*

## Required Backups

*<Determine any data backups needed prior to starting/competing the transition.>*

## Management of the Environment

*<Availability, access rights.>*

## Acceptance Clearance

*<Refer to the Deliverables Acceptance Management Plan.>*

## Testing

*<Define what needs to be prepared in the environment (necessary testing etc.).>*

## System and Data Conversion

*<Analyse any system and data conversion impact.>*

## Training

*<Determine any training to be performed.>*

## Maintenance and Support

*<Ensure that maintenance support is foreseen.>*

# Transfer of Responsibility

*<Define any transfer of responsibility for the project deliverables from the Project Core Team (PCT) to the Project Owner (PO) and support staff.>*

# Rollback Scenario & Plan

*<Ensure that in case the transition fails for any reason a rollback scenario is available so that business continuity can be guaranteed (when needed).>*

# Transition Checklist

*<In this section you can define a transition checklist for your project. The transition checklist can be a very useful tool to help you control the transition.>*

*<The transition checklist should be based on the information presented in this plan, i.e. the transition goals, prerequisites, and the deliverables of all transition activities.>*

*<You can use the checklist template provided by PM², customise it to your needs or create your own check list.>*

The Transition checklist can be found here *<Provide a link to the project folder/checklist.>*.

# Appendix 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g. the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>**<04.Project\_Handbook.XYZ.11-11-2017.V.1.0.docx>* | *<Example of a location>**< U:\METHODS\ProjectX\Documents\>* |
| 2 | Project folder | *<Insert project folder location.>* |
| 3 |  |  |