Your Company Name

Transition Out Plan

DATE

Revision History

Date	Version	Author	Changed

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Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document.   In any table, select and delete any blue line text; then click Home→Styles and select "Table Text" to restore the cells to the default value.

1   SUMMARY

The Transition Out Plan is used to describe how project deliverables will be brought to full operational status, and integrated into ongoing operations and subsequently maintained. Its purpose is to ensure that these deliverables will be used effectively to produce the requisite Business Value after project completion.

The Transition is a sum of the work to be done to create an effective support apparatus.

Include in this section a succinct summary including a top-level description of the transition plan at a high level and what the plan should accomplish. This section should include an overview and history of the agreement, specifically who the agreement pertains to, who it is transitioning to, and the timeframe/period of transition and any facts which are needed to successfully complete the transition.

2   TRANSITION APPROACH

This section discusses the overall approach and length of the transition. It includes the identification of any functions that still need to be performed and items which must be considered such as staff realignment during the transition or additional staff to handle and manage the transition. State any assumptions that you have made that may have made critical decisions in the document.

3   TRANSITION PLAN OBJECTIVES

Briefly describe the objectives of the plan.

For example:
- *Ensure that deliverables are of adequate quality to support full Business Value realization.*
- *Ensure that the customer is fully trained, capable of effectively using the deliverables, and willing to use the deliverables.*
- *Ensure that the work environment will support effective use of the deliverables.*
- *Identify staffing and training needs for system operation and maintenance.*
- *Facilitate ongoing updates to deliverables, ongoing help desk operations, and Quality Assurance oversight.*

4 TRANSITION TEAM ORGANIZATION

This section provides an organizational chart showing all resources and their roles in the transition (i.e. Transition Project Manager, etc.). Key team members should be from both the incumbent and new staffing arrangement as well as the customer.

Organization	Title	Roles / Responsibilities
PMO	*Technical Project Manager*	*Coordinates activities throughout transition and facilitates transition meetings as required.*
Org 1	*Transitional Functional Lead 1*	*Ensures all <function> activities are completed during transition; documents all processes, tasks, and activities for transition to the new responsible organization.*

4.1 Partner Staffing Transition

This section discusses the partnership staffing approach during the transition. In order to set expectations and allow for adequate transition planning, the incumbent staff must be determined and communicated ahead of time, assignments for knowledge transfer, etc.).

5 TRANSITION PROCESS TASKS

List the tasks that must be accomplished during the transition process. Some tasks will be repeated for each deliverable—be sure to include each task for each deliverable.

The following table suggests tasks, roles for who is responsible for each task, and a general timeframe for when the task is due. You will probably also have additional tasks to add to the list.

Task	Who's Responsible	When is it Due?
Develop training plans; identify necessary training courses	*Training Coordinator, Technical Project Manager, Production Support Manager*	*Main Transition*
Schedule training classes	*Training Coordinator, Technical Project Mgr, Production Support Manager*	*Main Transition*

Task	Who's Responsible	When is it Due?
Identify necessary knowledge transfer activities	*Training Coordinator, Technical Project Manager, Production Support Manager*	*Main Transition*
Determine measurable tasks to validate knowledge transfer is acceptable	*Training Coordinator, Technical Project Manager, Production Support Manager*	*Main Transition*
Notify business areas of production support procedures	*Production Support Manager*	*Go Live Gateway*
Notify stakeholders of transition to production status	*Production Support Manager or Technical Project Manager*	*Go Live Gateway*
Establish new on-call lists	*Production Support Manager*	*Shakedown*
Create help desk function and support staff	*Production Support Manager*	*Steady-State Gateway*
+Move development documentation and code to production repository	*Technical Project Manager And Configuration Manager*	*Steady-State Gateway*
Transfer user group / steering committee leadership to production support	*Production Support Manager and Business or Technical Project Manager*	*Steady-State Gateway*

5.1   Knowledge Transfer

This section discusses how knowledge is to be transferred from the incumbent staff to the assigned staff (documentation/instruction manuals including as-built documents, formal training classes, one-on-one knowledge transfer sessions, etc.). This is an important consideration as the transfer of knowledge provides for continuity of operations.

6 PRODUCT DELIVERY

6.1 Rollout Plan

If you possess a separate roll-out plan, briefly describe it and provide a hyperlink to that plan here. If you need to product one and it is not yet available, indicate that status as well as a reminder.

6.2 Data Migration

Describe any data that you must migrate into the deliverable system product during roll-out.

7 COMMUNICATION PLAN

Establish a schedule for transition team meetings, for transition reviews, and for reports to the development project team, the production support manager, and any other units involved in the transition of this application. Determine how reports are to be made (at project status meetings, at project review meetings, through email, etc.). Use the project stakeholder table to determine who has a stake in the transition progress.

The following methods will be used to keep stakeholders and outside parties informed and involved in the transition process.

Stakeholder Category	Stakeholder Name	Method of Communication	Frequency of Communication
Transition Team	*B. Jones*	*Face-to-face informal meetings* *Transition team meetings*	*Daily* *Monthly before ramp-up but weekly during transition*
Project Team	*S. Smith*	*Project status meetings*	*Weekly*
Project Sponsor	*G. Grady*	*Project status report*	*Monthly*
Project Steering Committee	*H. Hansen*	*Project status report* *Project status meeting*	*Monthly*
Project Manager Team	*J. Jensen*	*Committee Meetings* *Risk Issues Log*	*Monthly* *On-demand, when issues require it*
End Users	*C. Clyde* *D. Danner* *E. Effort*	*Project status report* *Transition status notification by email*	*Monthly* *When application reaches steady-state production*

Stakeholder Category	Stakeholder Name	Method of Communication	Frequency of Communication
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Outside groups such as vendors	*O. Oracle*	*Business letters*	*On an as-needed basis*

8   TRANSITION SCHEDULE

This section contains a schedule of the transition. The complexity of the transition will dictate the level of detail required in the schedule. However, all major milestones as well as transition start and completion dates should be included at a minimum.

Task	Start Date	Completion Date

9   HANDOVER AND ACCEPTANCE

This section declares how the customer will formally accept the handover at the end of the transition. This may include whether you elect to use the Project Acceptance Document in conjunction with this document for formal sign-off. There are typically several people who need to accept the handover and this varies with the agreement.

Organization	Name	Title	Date