**OE-PM Implementation Plan**

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Prepared by:

Date Created:

Date Last Revised:

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# Document Revision History

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| --- | --- | --- | --- | --- |
| **Version #** | **Date** | **Requestor** | **Revised By** | **Change Description** |
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**Note:**

Standardized Version numbering convention:

Drafts – (Before approval signature)

0.#

0.#+1

0.#+2

Published – (Once there is an approval on the document)

1.0

1.#

1.#+1

**Document Change Management and Distribution Procedures**

Changes will be applied to this document according to the following procedure:

1. Direct all change requests to the author of this document.
2. Each change request will be considered. If accepted, the change will be incorporated into a new draft of this document.
3. The new draft of this document will be circulated for review by appropriate project resources.
4. Approval of the new draft will be by concurrence of those individuals participating in the review.
5. Once concurrence is achieved, the draft becomes the new version of this document, replacing any existing and previous versions.
6. New versions of this document are to be distributed to appropriate project resources or made accessible on-line for reference. Notification of a new version will be communicated.

# Glossary of Terms

|  |  |
| --- | --- |
| **Term/Acronym** | **Definition** |
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# Document Information

## Purpose

A Project Implementation Plan is used to identify activities associated with an implementation to ensure adequate preparation has taken place and adequate contingencies are in place.

## Audience

* All project team members
* Project Sponsor, Business Owner, and IT/Technical Owner
* All other key stakeholders

## Criteria for Use

* Medium and Large projects per Sizing Matrix
* Small at the discretion of the Project Manager

## Timeline

## Implementation Planning in the Execution: Build subphase

## Naming Convention

Implementation Plan should be saved with the following naming convention: ImplementationPlan\_ProjectName\_Author Initials\_Month\_Day\_Year (e.g. ImplementationPlan\_Wealth Management Strategy\_LL\_1\_21\_11).

**\*Delete all italic sections before completing the document. These are only for use by the person(s) completing the document.**

# Project Information

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Manager** | Overall project manager | **Project Sponsor** | Overall responsible person |
| **Business Owner** | Escalation point in business | **IT Owner** | Escalation point in IT |
| **Project Description** | Short description of the project (i.e. What is project about? Why is the project being done? What are the high level goals of the project?) | | |

# Overall Approach

<Describe the approach to implementation and Include the underlying rationale for using the approach.>

# Organizational Perspective

<Describe all the modifications that will be necessary in the organizational structure, work flow, and personnel plans in order to support the new product, service, or system.>

# Documentation Plan

<Identify the audience for whom the documentation will be prepared and the different kinds of documentation (i.e., manuals) that are specific to the project implementation (examples below). As well, note any differences by channel, as appropriate.>

1. **Communications:**
2. **Marketing:**
3. **Operations:**
4. **Technical:**
5. **Training:**
6. **User/Customer Support:**

# Roles and Responsibilities

<This section is reserved for a quick reference of the players and responsibilities of the teams and departments. It is important to clearly outline the roles that each department will play during implementation – this will ensure that communications are directed to the appropriate groups quickly. Further, the responsibilities for each department and group should be described clearly – this will allow not only the responsible party to understand, but the others working on implementation to grasp whose duties are whose.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Department | Name | Responsibility | Office Number | Mobile |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Conversion Plan

**Preparation:**

<Refer to Business Requirements documentation and any architectural or design documents, or meet with the team for the project to provide input for this section. However, the Conversion Plan should include information on Mock Conversion, Pilot Conversion, Full Implementation, etc., (if applicable).>

**Conversion Verification (Clean-up):**

# Schedule Summary

<As a reference, there should be an overview of the tasks and action items that will be done during the implementation. This will include a high-level version of the Detailed Schedule, grouping events per day or week.>

**NOTE:** The actual, detailed Implementation schedule should be part of the over Project Schedule or a separate schedule in Microsoft Project. This is left up to the discretion of the Project Manager. The Implementation Schedule should include, but not limited to; start date, end date, delivery date and progression window to the next phase.

**Implementation (Example)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Resource(s)** | **Start Date** | **End Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Post Implementation (Example)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Resource(s)** | **Start Date** | **End Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Success Factors

<The success of the implementation is dependent on certain events taking place, and certain aspects of the project working properly. It is crucial that the most vital aspects of the implementation be outlined in this section.>

**Show Stopper events:**

<“Show stopper” events are those which will stop implementation of the project. It is important to understand what tasks must be successfully performed in order to continue moving forward. “Show stopper” events stop the other aspects of implementation, until the issue is resolved.>

**High Priority events:**

<A high priority event is a task or aspect of the project that should be given great attention. This event must be completed to finish implementation. These are not as crucial to the process as “show stopper” events. However, high priority events must be resolved within an agreed upon window to continue with the implementation.>

**Low Priority events:**

<These events are necessary to the project and must be completed; however the timing is not crucial to the success of implementation. These events can be resolved after the change project has been implemented.>

**“Nice to haves” events:**

<The “nice to haves” are events and objectives that would benefit the project, however, these events are crucial neither to timing nor to the effect of the change project during normal production. If time or desire permits, the responsible department or group can, and should, follow-up on the event.>

### Escalation Plan

<This section is used to summarize the plan to determine whether the implementation team should discontinue a rollout and initiate the contingency plan or continue with the implementation, based on any risk identified during execution.

This plan should outline the process to communicate between the technicians, implementation team, project management team, the client or any other responsible parties. The escalation process allows the information to reach those persons with the power to make the decision to continue or to cease and rebuild.

Summarize the Escalation Plan here. Provide details either by reference to a separate document, or include details in an Appendix.>

### Contingency Plan

<Summarize the Contingency Plan here. Provide details either by reference to a separate document, or include details in an Appendix.>

### Post Implementation Transition

**Participants:**

<The participants that will use the output of the project in normal production need to be listed here. The team should keep in mind the end-users and groups supporting them. All the appropriate relationships and contact information should be documented here, this will be the point of contact to verify readiness and coordinate to resolve issues.>

**Timeframe:**

<During the early stages of implementation the normal production teams and support groups, to define when the implementation team will be rolling off the project and when the normal production support groups will be fully supporting the end-user again.

**NOTE:** The timeline should take into account a mutually decided upon window of overlap, and staged roll-off of the implementation team.>

**Hand off to business as usual:**

<The hand-off to business as usual should be documented as a timeframe and phased process. It is highly suggested that this be set as a formal meeting, incorporated into an afternoon of final updates to the support groups and end-users along with an opportunity to ask questions of the subject matter experts, as well as the implementation team.>

# Approvals

<Documented approvals are required from designated approvers.>

|  |  |
| --- | --- |
| **Role/Name** | **Approval Date** |
| Business Owner: |  |
| Technology Owner, if applicable: |  |
|  |  |
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