Project Transition to BAU Plan Template

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# Context

*Please remember this document template is just a suggestion; every business and organisation will have different documentation standards and expectations of their business analysts, so only use the templates that will help you drive value in your role. There are no formal “standards” across the Business Analyst profession, and this is merely a starting point to help you get started. We recommend, suggest and implore you to edit, modify, delete, add, substitute and otherwise re-work this to provide value. The commentary/advice highlighted in italic blue like so is designed to help you fill out the documentation, and SHOULD BE DELETED BEFORE DISTRIBUTION INTERNALLY!*

This document is used to assist the project team in transitioning an externally developed tool/system/product into the Business As Usual (BAU) ongoing owning team. The purpose of this Transition Plan is to ensure the smooth transition of the ICT project into the Business As Usual (BAU) support teams. It is important to be as descriptive as possible so that the contents of this document can be effectively utilized by the BAU Teams.

It requires input from both the delivery team as well as the receiving team.

*We create and share this content to help give back to the community, and give aspiring Business Analysts the guidance we wish we had when we started out.*

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# Document Control

## Summary of Document Changes

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Reason** |
|  |  |  |  |
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## Quality Assurance

|  |  |  |
| --- | --- | --- |
| **Version** | **Date** | **Reviewer** |
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## Document Approver

|  |  |  |
| --- | --- | --- |
| **Name** | **Date** | **Signature** |
|  |  |  |

# Introduction

## Purpose

<Document the purpose of this document

Example: The purpose of this document is to detail the business requirements>

## Background

<Brief description on the initial stimuli of the project and how the organization intends to achieve its goals and make the desired transition and by what means>

## Definitions

<List any terms the audience may not understand, including specific terms, abbreviations and acronyms>

|  |  |
| --- | --- |
| **Terms, abbreviations and acronyms** | **Meaning** |
|  |  |
|  |  |
|  |  |

## Referenced Documents

|  |  |
| --- | --- |
| **Document Number / Location / Links** | **Reference Description/Name** |
|  |  |
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## Scope

|  |
| --- |
| **In Scope** |
| *<List what is in-scope for the project>* |
|  |

|  |
| --- |
| **Out of Scope** |
| *<List what is out of scope for the project>* |
|  |

## About the System

<Provide a summary of the system/application/software being delivered. Identify the key features of the system/application/software highlighting any key differences with the earlier/existing system>

# Stakeholder Profile

<As an initial introduction, provide a high level summary of key stakeholders (individuals) and stakeholder groups identified thus far. This should include existing roles / groups as well as identify roles / forums to be established for the roll-out of the project (i.e. governance forums)

*>*

Summary of Document Changes

|  |  |  |
| --- | --- | --- |
| **Stakeholder / Stakeholder Group** | **Description** | **Audience Size** |
| **Executive** |  |  |
| **Steering Committee** |  |  |
| **<insert a row for each Stakeholder group>** |  |  |

# High Level Impact Assessment

<Insert an initial high-level impact assessment summary. The scale of change will determine how this information should be captured>

|  |  |  |
| --- | --- | --- |
| **Change Summary** | **Impacted Stakeholder Groups** | **Impact Rating (H/M/L)** |
|  |  |  |
|  |  |  |
|  |  |  |

# List of Project Design Documentation

<List the various project documents, their status and location.>

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of document** | **Author** | **Embedded document** | **Complete** |
|  |  |  |  |
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# Outstanding Change Requests and Issues

|  |  |  |
| --- | --- | --- |
| **Change Request / Issue No.** | **Change Request / Issue Details** | **Impact Rating (H/M/L)** |
|  |  |  |
|  |  |  |
|  |  |  |

# Outstanding Defects

<Generally all high priority effects should have already been resolved prior to the project completion. However if there are some low priority defects, the Business and Project Team might jointly agree to fixing them post deployment during the warranty period.>

|  |  |  |
| --- | --- | --- |
| **Defect No.** | **Defect Details** | **Impact Rating (H/M/L)** |
|  |  |  |
|  |  |  |
|  |  |  |

# Maintenance and Support

<The Maintenance Plan is used to describe the ongoing maintenance requirements for the project outputs once they have been accepted by the Business Owner, and how they will be achieved>

## Scope

### Computer systems and applications

<Insert here>

### Hardware and other peripherals

<Insert here>

### Business manuals or documents

<Insert here>

## Warranty

<Insert the details of the warranty provided for the project>

|  |  |
| --- | --- |
| **Warranty Features** | **Details** |
| **Length of Warranty Period** |  |
| **Warranty Support Arrangements** |  |
| **Hours of Support** |  |
| **Contact Names/Details** |  |

## Contracts and / or service level agreements for internal / external suppliers

<Document the contracted service level agreements (if any) of the warranty>

## Maintenance Costs

<Document the estimated maintenance cost>

# Prepare for Change

## Business Continuity Plan

<In the event of any disaster with the project, the following tiered approach should be taken:>

|  |  |
| --- | --- |
| **First Tier support** |  |
| **Second Tier Support** |  |
| **Third Tier Support** |  |

## Role and Hierarchical Changes

<Document any changes to the staff roles or changes to the organisation heirachy if any. It might me worthwhile here to add the planned organisation chart>

## Continued Project Manager and Project Team Involvement

<If the project team will be involved even after the project is deployed, it can be included here highlighting their key responsibilities and availability>

## Removal of Current System

<Document any particular activities are required to be done as part of removal of the current system>

## Policy changes

<Document any new policies which have been planned due to the new project together with any existing policies which will have become redundant and expected to be removed>

## Training Plan

<List the key objectives of the training strategy for the project, i.e. make it clear what is being tried to achieve through training. Provide any restrictions to the training, based on the over-arching training framework in place.

Identify the appropriate training approach, for example formal or informal training program. If g multiple methods of delivery are being utilised, clarify what will be used and what needs to be developed (I.e. training materials). Outline who will be responsible for delivering the project training to the business – what are their roles and responsibilities? How will they be selected? How will coaches be prepared for the responsibility of training?

Identify the key audience groups in scope for the training. It is important to estimate how many users there are per group and where they are located, as these factors will impact the training strategy

Conduct a Training Needs Analysis to identify the size of the knowledge gap for the business based on the implementation / changes If training is required, develop a Training / Performance Support Plan to define the courses / materials to be developed

Indicate a Training Schedule>

## Communication Plan

< The Communication Plan is used to document the targeted communication plan and materials to address: Why and when the changes are happening?

Who is directly impacted?

What the benefits are to the individual.

The Communication Plan may be formal, informal, detailed or broad, depending on the needs of the project. Communication is a major component of a successful project>

## Transition Schedule, Tasks and Activities

* *< Outlines the detailed schedule for the transition. The following lists provides an example of considerations:*
* *Logical work breakdown, key milestones and dependencies during transition and deployment.*
* *Testing and verification activities, including testing of related/impacted projects, software, and hardware.*
* *Contingency plans and work-around(s) in the event problems arise.*
* *Specific activities related to new and/or existing equipment, including roles and responsibilities of external vendors and internal resources.*
* *Specific activities related to new, existing, and/or upgraded software, including roles and responsibilities of external vendors and internal resources.*
* *Systems and/or data back-up(s), conversion plans, etc.*
* *Hand-off(s) between developers, vendors, operational staff, and/or technical support.>*

# Transition Team

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Email** | **Phone** | **Role during transition** | **Shift (if working across shifts)** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |