**Implementation and Migration Plan Template**

**Implementation and Migration Plan**

**<Project Name>**

**Company Name**

**Street Address**

**City, State Zip Code**

**Date**

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# Purpose

The purpose of the Implementation and Migration Plan is to communicate how the project design will be deployed, installed, and transitioned into operation. This includes the migration from the project team to the individual or group responsible for ongoing operation of the product. This section should provide a detailed description of both the implementation steps, migration steps from project team to operation team, as well as the specific requirements and responsibilities of all involved.

This Implementation and Migration Plan has been developed to communicate how the MaintMax Maintenance Database Project will be implemented, installed, and migrated to its operational environment within Ace Corporation’s Maintenance Division. The purpose of this plan is to ensure all stakeholders are aware of the details, requirements, and responsibilities involved in successfully completing this project and migrating the product to the operational group. Any requested changes to this plan should be submitted through the project’s change control process for review and approval prior to implementation.

# Description of Implementation

The implementation of the project consists of the steps involved in the deployment and installation of the project’s product either to the customer or throughout the organization it was designed for. This section should provide a detailed description of the implementation steps up until the project’s product is to be migrated to the responsible group for continued operations.

The MaintMax Project will be implemented in Ace Corp.’s Maintenance Division to replace the existing maintenance tracking system which is inadequate for expanding operations. The implementation of this database is a deliberately planned and highly technical effort. This description of the implementation will provide all stakeholders with a detailed understanding of how the implementation will occur.

Upon completion of the design for the MaintMax Database, a beta version of the database will be loaded in Ace Corp.’s virtual testing server. Ace Corp.’s IT Group will capture all existing data from the existing database and load that data into the MaintMax database in order to test data integrity and compatibility between how maintenance data is captured and the new MaintMax database. Once testing is complete and functionality of the MaintMax database is verified, operator training will be conducted with maintenance staff on the new tool. Once training is complete, the MaintMax Database will be loaded onto Ace Corp.’s maintenance servers and partitioned off to prevent user access. Ace Corp.’s IT Group will then verify functionality of the database on the actual Ace Corp. maintenance servers.

Once functionality on maintenance servers is confirmed, a notification will be distributed to the entire organization communicating the transition from the legacy maintenance database to the new MaintMax Database. At this point in time, the maintenance staff, in conjunction with the IT Group will conduct a final data capture of all maintenance data on the legacy system and the data will be imported by the IT Group to the MaintMax Database. Once the data import has been deemed successful by the IT Group, the legacy system will be turned off. At this point in time a manual contingency operation will be employed wherein maintenance technicians capture all maintenance actions manually for a period of two days while the MaintMax Database is prepared to go live. Upon approval from the IT Group, the MaintMax Database will go live and be used for a period of forty-eight hours by the maintenance technicians with IT Group support to ensure acceptance criteria are met. Once the team verifies that the acceptance criteria have been met, the manually captured maintenance data will then be entered into the MaintMax Database. Completion of entering the manual data and achievement of the acceptance criteria formally ends the implementation phase of this project.

# Points of Contact

Communicating points of contact for all phases of a project is vital in order to ensure stakeholders understand who can address questions or concerns related to various aspects of the project. This is especially true for implementation and migration as this may be an extremely fluid part of the project and the responsibility may be shifting from one group to another.

The MaintMax Database Project spans several different Ace Corp. organizations and is an extremely fluid and technical project. As such, it is important to understand the points of contact for the various aspects of this project. The chart below provides all stakeholders with the points of contact should any urgent questions or concerns arise. All stakeholders should ensure their communications are compliant with the MaintMax Database Project Communications Plan.

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Contact Information** |
| O. Gray | Project Sponsor | (555) 555-1000 |
| M. White | Project Manager | (555) 555-1111 |
| C. Brown | Maintenance Division Lead | (555) 555-1112 |
| T. Blue | Maintenance Operations Lead | (555) 555-1114 |
| C. Black | Lead IT Engineer | (555) 555-1332 |
| W. Green | Asst. IT Engineer | (555) 555-1333 |
| H. Teal | Security Administrator | (555) 555-1339 |

# Major Tasks

All project tasks will be included in various places of a project plan as they’re identified and documented. However, for the implementation and migration plan, a list of major tasks should be included to provide awareness of all project stakeholders. Often, major tasks represent tasks which require the greatest level of effort, or contain the greatest risk. This section should provide a list of the major tasks for the project, what group or individual is responsible, and a brief description of the task.

The MaintMax Database Project Team has developed a list of major tasks required to successfully implement and migrate this project. All of these tasks have been vetted by the project team to ensure they are within the scope of this project. Additionally, all major tasks have been assigned to the responsible individuals and/or groups and communicated to all stakeholders. The list of major tasks for the MaintMax Implementation and Migration Plan follows:

1. Complete MaintMax Design: IT Group

This task includes completion of all design work for the new MaintMax Database

1. Complete Testing: IT Group

This task involves the successful testing of the MaintMax Database in the virtual testing environment

1. Complete Operator Training: IT Group and Maintenance Operations Group

This task is for the completion of operator training on the new MaintMax Database

1. Verify Functionality on Maintenance Servers: IT Group

This task involves the IT Group loading the database onto the maintenance servers and testing functionality

1. Complete Data Capture: IT Group

This task involves capturing all existing maintenance data from the legacy database to the MaintMax Database

1. Go Live/Launch: IT Group and Maintenance Operations Group

This task represents the official operational launch of the MaintMax Database

1. Operational Acceptance: Maintenance Operations Group

This task involves formal acceptance of the MaintMax Database by the Maintenance Operations Group

# Implementation Schedule

The project implementation schedule is used to communicate timeframes for the completion of tasks or milestones to the project team and stakeholders. Scheduling is an integral part of all projects and proper communication is key to ensuring understanding for all involved. The level of detail for the implementation schedule is at the discretion of the organization. This section should provide the implementation schedule for at least high-level milestones or tasks.

The implementation schedule for the MaintMax Database Project is provided below. For consistency, the major tasks/milestones described above are included in this schedule for awareness of the project team and stakeholders.

|  |  |
| --- | --- |
| **Task/Milestone** | **Scheduled Completion Date** |
| Complete MaintMax Design | June 1, 20xx |
| Complete Testing | July 1, 20xx |
| Complete Operator Training | July 20, 20xx |
| Verify Functionality on Maintenance Servers | August 1, 20xx |
| Complete Data Capture | August 15, 20xx |
| Go Live/Launch | August 20, 20xx |
| Operational Acceptance | September 1, 20xx |

# Security

Security is an important consideration throughout project implementation and migration, specifically pertaining to IT projects. Security may take many forms which may be specific to the project, or fall under existing organizational security policies and procedures. Based on this, as well as the project complexity, the security considerations may be extremely detailed or very general. This section should describe all security measures included in the implementation and migration of the project so all stakeholders have a clear understanding.

Ace Corp.’s information technology security measures are established and enforced through Ace Corp.’s IT Group. The MaintMax Database will reside behind Ace Corp.’s existing firewalls and security measures administered by the IT Group’s Security Administrator. While no special or additional security measures will be implemented beyond what already exists for the legacy database, the Security Administrator will be involved in all phases of design, testing, implementation, and migration. Additionally, once the MaintMax Database migrates to operational use, it will be monitored by the Security Administrator, along with other IT Tools, to ensure continued compliance with Ace Corp. security policies.

# Implementation Support

Based on the size and complexity of the project, the level support required for implementation may vary. It may consist of only the project team, a small group of individuals, or a large group of coordinated support personnel. This section should provide a description of the personnel supporting the implementation of the project as well as what type of support they will provide.

The MaintMax Database Project will require a moderate level of support from internal Ace Corp. groups. The groups directly involved in providing support for this project are the Program Management Office (PMO), the Maintenance Operations Group, and the IT Group.

The Project Manager (PMO Group) will facilitate all meetings and discussions in completing the tasks for this project. The Project Manager will work directly with both the IT Group and the Maintenance Operations Group to complete these tasks.

With feedback and requirements from the Operations Maintenance Group, the IT Group will design, test, and implement the MaintMax Database on both the virtual testing servers and the maintenance servers. The IT Group will also develop and provide training to maintenance operators on the MaintMax Database. These tasks will be done by the lead and assistant IT engineers. If additional support is needed, it will be coordinated through the Project Manager and IT Group Lead.

The Maintenance Operations Group will provide all operational requirements to the IT Group for inclusion in the design and implementation of the database. The Maintenance Operations Group will also be required to provide feedback on testing. Additionally, all maintenance operators will participate in MaintMax Database training. If additional support is needed, it will be coordinated with the Project Manager and the Maintenance Division Lead.

# Listing of Hardware, Software, and Facilities

Often, IT projects require new or upgraded hardware, software, and facilities to accomplish the project. This also depends on the size, complexity, and scope of the project. Smaller projects may involve simple software upgrades on existing hardware and in existing facilities. Large projects may require new hardware and/or additional facilities which may require significant capital investments. This section should describe the hardware, software, and facilities required to complete the project.

The MaintMax Database Project requires a database design on an upgraded Smarttech II platform as opposed to a Smarttech platform where the existing database resides. While this allows improved functionality and capability, it does not require any additional hardware or upgrades to existing hardware. Likewise, no additional facilities are required to complete the implementation and migration of this project. This project will be completed within the existing capabilities of Ace Corp.’s hardware and current facility.

# Performance Monitoring

Performance monitoring is a critical tool for ensuring that the implementation and migration of an IT project was successful. There must be a mechanism in place to provide both short-term and long-term feedback on the performance of the deliverable. This section should describe how this will be accomplished and who is responsible for monitoring performance.

The MaintMax Database will provide not only the same capabilities as the legacy database, but additional functionality as well. As such, these additional functions have been included by the design team in planning for ongoing performance monitoring of the MaintMax Database. To accomplish this, additional monitoring criteria have been added to the operational environment to collect real-time data once the database is migrated to its operational environment. The Maintenance Operations Lead is responsible for monitoring performance and producing weekly reports which will be provided not only to Ace Corp. senior management, but to the IT Group Lead as well. If MaintMax performance monitoring indicates any database performance outside of the acceptable levels, the issue will be escalated immediately to the Ace Corp. staff leads to determine and execute corrective measures and initiate a root cause analysis. This is the existing procedure Ace Corp. utilizes for all IT tools.

# Implementation Requirements

In order to conduct a successful project implementation and migration, the requirements must be clearly identified and communicated to all stakeholders. All project plans include provisions for thorough requirements gathering activities through any of several methods. Requirements may consist of hardware, software, facilities, human capital, funding, or other capital investment requirements. This section should provide a list of all requirements necessary for a successful implementation of the project.

For the MaintMax Database Project, the project team and stakeholders have completed their requirements gathering activities. As this is a small to moderately sized project, and will be completed internally with no contract or external support, the list of requirements is very specific and manageable. The following list represents the requirements necessary for successful implementation of the MaintMax Database Project:

Hardware/Software:

Functional virtual testing servers – existing

Functional maintenance servers – existing

Smarttech II Database Upgrade – new purchase for this project

Personnel:

Lead IT Engineer – on project team

Assistant IT Engineer – on project team

Maintenance Division Lead – on project team

Maintenance Operation Lead – on project team

Maintenance Operators – as needed for testing, training, and feedback

Security Administrator – on project team and ongoing operations support

Facilities:

None – utilize existing facilities

Other Capital Investments:

None – utilize existing resources

# Back Out Plan

IT Projects are, by their nature, highly technical and challenging endeavors. This is especially true for new systems being implemented to replace older systems. As part of implementation planning, there must be a back out plan to revert to existing systems and processes should the implementation of the new system fail. While troubleshooting is conducted to determine the problems, operations must continue. This section should describe the back out plan that will be executed should the implementation fail.

During planning for the MaintMax Database implementation a risk was identified that the new database may fail once it goes live on Ace Corp.’s maintenance servers. To mitigate this risk the project team has developed a back out plan to allow the maintenance group to continue operations should the MaintMax launch fail.

As the data capture task is conducted, all maintenance data will be updated for both the MaintMax Database and the legacy maintenance database. The legacy database will remain on the maintenance servers until MaintMax Database implementation and operational acceptance are complete. If MaintMax is launched and encounters any problems or failures, the IT Group will immediately remove access for all operational maintenance technicians and restore access to the legacy database. This will allow maintenance operations to continue while troubleshooting and additional testing are conducted on the MaintMax Database.

# Post Implementation Verification

It is extremely important that successful implementation of the project is verified. This verification may take many forms and use many different methods. This section should describe how successful implementation will be verified so all project team members and stakeholders understand what constitutes successful implementation.

Once the MaintMax Database is implemented, several steps will be taken to verify successful implementation. First, operations managers will ensure that all maintenance technicians have access to the database to perform assigned maintenance activities. Once this is verified, managers will ensure their maintenance technicians check their ability to perform all assigned functions in the MaintMax Database and that the correct permissions and activities are in place. Finally, maintenance managers will query and run all assigned metrics and reports to ensure all required capabilities for the MaintMax Database are met. Upon completion of these activities, maintenance managers will meet with the project team to review all verification activities in a final verification that implementation requirements were successfully met.