## 6.11. Implementation Plan

6.11.1. Executive Summary

The SurveiRams Ticketing System project is nearing completion, and as part of the project closeout, a transition out plan has been developed to ensure a smooth handover of the system to its new owners. The purpose of this plan is to provide a high-level overview of the transition process, including the history of the contract, the current state of the system, and the planned transition to the new owners.

The SurveiRams Ticketing System was developed by our organization in collaboration with the client to improve their dispatch operations. The system has been in use for the past year and has successfully achieved the project objectives. As per the contract agreement, the system is now transitioning to the client's ownership.

The current state of the system is stable and operational. All required functionalities have been tested and validated, and user training has been completed. As we transition out, we aim to ensure that the client is equipped with all necessary documentation and support to manage and maintain the system effectively.

The new owners will receive all project deliverables, including technical documentation, user manuals, and source code, to ensure they have a comprehensive understanding of the system. We will also provide knowledge transfer sessions to the new owners, covering system operations, maintenance, and troubleshooting.

The transition out plan for the project includes a detailed timeline with a focus on a smooth and successful handover to the new contractor. The execution phase of the transition plan involves user training and go-live, which will take place at the end of March 2024. The closeout phase of the plan involves several key activities, including documenting lessons learned, updating files and records, gaining formal acceptance, archiving files and documents, and holding a project closeout meeting. These activities will take place throughout April 2024, with the project closeout meeting scheduled for the month of May. Throughout the transition, the transition team will work closely together to ensure a smooth handover and minimize any disruptions to the project's operations. The team will consist of various roles, including the Transition Project Manager, Technical Lead,, Quality Assurance Lead, and Project Team Members. By following this transition plan and timeline, the project team aims to ensure a successful and seamless handover to the new contractor while maintaining the quality of the project's deliverables.

Overall, the transition out plan aims to ensure that the client receives a fully operational and sustainable system, and that our organization completes the project on a positive note.

6.11.2. Transition Approach

**General Approach:**

To ensure a smooth and uninterrupted transition for the SurveiRams Ticketing System Project, a phased approach will be implemented, prioritizing continuity and minimal disruption. The aim is to transfer knowledge, resources, and responsibilities gradually and systematically to the new team, thereby minimizing the risk of service interruptions and downtime.

The project management process encompasses the following stages:

1. **Identifying Key Variables:** An in-depth understanding of the essential factors, variables, or parameters relevant to the project will be established. This involves recognizing crucial elements that significantly impact the project's overall success.
2. **Determining Roles:** The specific roles and responsibilities of each team member will be determined. This entails assigning particular tasks and clearly defining the roles and duties of individuals involved in the project.
3. **Clarifying Responsibilities:** Clear and concise responsibilities will be outlined for each team member. This ensures that everyone possesses a precise understanding of their specific duties and the expectations placed upon them.
4. **Assigning Work:** Tasks and activities will be delegated to team members who possess the appropriate skills and expertise. This delegation process ensures an effective and efficient distribution of workload.
5. **Monitoring Progress:** The progress of the project will be closely monitored to track the timely completion of tasks and milestones. This allows for the prompt identification of any issues or delays, enabling proactive corrective actions.
6. **Implementing Corrective Action:** In the event of any project-related challenges or issues, suitable corrective actions will be undertaken. This may involve modifying the project plan, reallocating resources, or making necessary adjustments to ensure the achievement of project success.

By following these steps, the project management process facilitates effective communication, meticulous planning, knowledge transfer, efficient allocation of staff, and the ability to actively monitor progress while addressing any emerging issues.

**Timeline:**

The transition plan is divided into two primary phases: implementation and closeout.

The implementation phase, scheduled from February 15 to April 18, includes activities such as user training and progress monitoring. The closeout phase, which takes place from April 19 to June 7, involves documenting lessons learned, updating files/records, obtaining formal acceptance, archiving files/documents, and conducting a project closeout meeting.

The timeline provides a detailed schedule for each activity, ensuring that all transition tasks are completed promptly. The success of the transition plan hinges on the careful planning and execution of each activity as outlined in the timeline.

**Assumptions:**

To facilitate the transition approach, the following assumptions will be made:

1. The Project Developers and Software testers will be physically present on-site or available for online meetings to actively participate in the transition process and receive knowledge transfer.
2. The project team will provide the Quality Assurance Lead with all necessary documentation, training materials, and instruction manuals to facilitate the transfer of knowledge.
3. Asia Pacific College (APC) will supply all required equipment and software licenses to the project team to support the system.
4. The project team possesses the requisite skills and knowledge to sustainably support the system once the transition is completed.

6.11.3. Transition Team Organization

1. **Transition Project Manager (TPM):** The individual accountable for the overall success of the transition. The TPM oversees the transition team, ensures the timely completion of transition tasks, maintains coordination with the customer, and guarantees adherence to the transition plan.
2. **Developers/Technical Lead (DTL):** Responsible for offering technical proficiency throughout the project. The Developers/Technical Lead collaborates closely with the project team to comprehend the system and establish a transition plan. Additionally, the TL facilitates coordination with the new contractor to ensure a seamless transfer of technical knowledge and expertise.
3. **Software Tester Lead (STL):** Tasked with creating test plans, organizing testing activities, and upholding software quality standards. The STL closely collaborates with project managers, developers, and stakeholders to ensure a smooth and successful software testing process.
4. **Quality Assurance (QA) Lead:** Responsible for guaranteeing that all deliverables meet the quality standards specified in the transition plan. The QA Lead works in close collaboration with the TPM to develop quality metrics and ensure the completion of all transition tasks to a high standard.
5. **Project Team Members:** Responsible for providing support, knowledge, and expertise regarding the system. They work closely with the TPM, developers, and other team members to facilitate a seamless transition of knowledge and expertise.

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| Role | Responsibilities |
| Transition Project Manager | The individual accountable for the overall success of the transition. The TPM oversees the transition team, ensures the timely completion of transition tasks, maintains coordination with the customer, and guarantees adherence to the transition plan. |
| Developers/Technical Lead | Responsible for offering technical proficiency throughout the project. The Developers/Technical Lead collaborates closely with the project team to comprehend the system and establish a transition plan. Additionally, the TL facilitates coordination with the new contractor to ensure a seamless transfer of technical knowledge and expertise. |
| Software Tester Lead | Tasked with creating test plans, organizing testing activities, and upholding software quality standards. The STL closely collaborates with project managers, developers, and stakeholders to ensure a smooth and successful software testing process. |
| Quality Assurance Lead | Responsible for guaranteeing that all deliverables meet the quality standards specified in the transition plan. The QA Lead works in close collaboration with the TPM to develop quality metrics and ensure the completion of all transition tasks to a high standard. |
| Project Team Members | Responsible for providing support, knowledge, and expertise regarding the system. They work closely with the TPM, developers, and other team members to facilitate a seamless transition of knowledge and expertise |

*Table 6.11—1: Roles and Responsibilities*

6.11.4. Workforce Transition

The transition of the workforce holds significant importance within the SurveiRams Ticketing System project's plan for transitioning out. To ensure a seamless and efficient transition, it is imperative to establish and effectively communicate a comprehensive workforce plan.

As an integral part of the transition team, the Transition Project Manager will closely collaborate with both the existing and new contractors, as well as the customer, to determine the most optimal approach for managing the workforce. This may encompass various actions, such as retaining the current staff, transitioning employees to the new contractor, or even recruiting new personnel.

Clear and timely communication plays a pivotal role in this process, as it is crucial to keep the workforce informed of any changes in a respectful manner. Working closely with BMO, ITRO, and security management, the Transition Project Manager will ensure that all staff members are well-informed about their options and receive the necessary support throughout the transition.

Furthermore, any required training or re-training will be provided to ensure that the workforce is fully equipped to deliver exceptional services during and after the transition period. The workforce transition plan will be subject to regular review and updates as necessary, with the ultimate goal of successfully completing the project within the designated timeframe and budget.

6.11.5. Workforce Execution During Transition

During the transition period of the Dispatch Directory System project, several essential tasks will still need to be completed, which are as follows:

**User Training:** This involves developing and delivering training materials to educate users about the new system. The training sessions will likely span three days and will include a combination of classroom instruction and hands-on practice.

**Live System:** This signifies the actual launch of the new system. Before making it available to users, the team must ensure that all necessary systems are in place and functioning properly. This will likely involve conducting final system tests and verifying the accurate migration of data.

**Documentation of Lessons Learned:** This phase involves documenting the insights gained throughout the project. It entails identifying areas where the team performed well and areas where improvements can be made. The document will serve as a valuable resource for future projects, promoting the adoption of best practices.

**Updating Files/Records:** The team will be responsible for updating relevant files and records to reflect the project's completion. This may include archiving specific documents or updating contracts and agreements with updated information.

**Formal Acceptance:** This phase involves obtaining formal acceptance from the customer, indicating successful completion of the transition. The team must ensure that all deliverables have been met and that the customer is satisfied with the new system.

**Archiving Files/Documents:** In this phase, all project-related files and documents will be archived. This may include contracts, agreements, project plans, and other pertinent materials.

**Project Closeout Meeting:** The final phase of the transition includes a project closeout meeting with all stakeholders. This meeting provides an opportunity to discuss the project as a whole, acknowledging successes, areas for improvement, and ensuring resolution of any outstanding issues.

6.11.6. Subcontracts

As there are currently no contracts or subcontract agreements associated with this project, there is no need for any transition or transfer of contracts or related agreements.

6.11.7. Property Transition

6.11.7.1. Government Furnished Equipment (GFE)

Since there is no involvement of Government Furnished Equipment (GFE) in the Dispatch Directory System project, this section of the transition plan is not applicable.

6.11.7.2. Incumbent Owned Equipment

It is important to clearly identify the equipment that is owned by the incumbent and will remain with them. If there is any equipment that is needed to support the customer's applications and services, the plan should state whether the new contractor or customer has the option to purchase or use it. The plan should also include a timeline for the transfer of ownership and any necessary documentation, such as bills of sale or transfer of ownership agreements.

In the case of the dispatch directory system project, if TELUS can provide the necessary equipment upon transition, there may not be a need for the project team to transition the equipment to CREST. However, it is still important to clearly identify which equipment is incumbent-owned and which will be provided by TELUS to ensure a smooth transition and avoid any potential conflicts or misunderstandings. The project team should work closely with TELUS and CREST to ensure that all necessary equipment is available and properly transferred.

6.11.7.3. Intellectual Property

During the transition process of the Dispatch Directory System Project, it is important to consider the handling of intellectual property (IP) to ensure a smooth transfer of all relevant documentation, supplier and subcontractor information, service agreements, or original designs or plans. IP generates many legal considerations and may include the completion of non-disclosure agreements (NDAs) between the incumbent and the customer.

The following steps will be taken to ensure proper handling of intellectual property during the transition:

1. Identification of all relevant intellectual property:
   * All intellectual property related to the project will be identified, including but not limited to design documents, patents, trademarks, copyrights, software code, and any proprietary information or trade secrets.

1. Evaluation of contractual agreements:
   * Existing contractual agreements related to intellectual property ownership and transfer will be reviewed and evaluated to ensure compliance during the transition.

1. Negotiation of new agreements:
   * In case of any gaps or inconsistencies in the existing agreements, new agreements will be negotiated between the incumbent, new contractor, and the customer to ensure proper ownership and transfer of all intellectual property.

1. Protection of intellectual property:
   * During the transition period, all intellectual property will be protected through the use of non-disclosure agreements (NDAs) and other legal measures.

1. Transfer of intellectual property:
   * Upon completion of the transition process, all relevant intellectual property will be transferred to the new contractor, the customer, or retained by the incumbent based on the contractual agreements in place.

By following these steps, the Dispatch Directory System Project can ensure a smooth and secure transition of all intellectual property related to the project.

6.11.7.4. User Accounts and Passwords

As part of the transition plan for the Dispatch Directory System project, it is important to address the transition of user accounts and passwords. The following details the steps and considerations for this aspect of the property transition:

1. User Account Inventory
   * To begin, a comprehensive inventory of all user accounts and their associated privileges should be created. This inventory should include both internal and external users, such as system administrators, third-party vendors, and end users. The inventory should also specify which accounts are no longer active or necessary for the system.
2. Password Security
   * It is essential to maintain security throughout the transition process by ensuring that all user passwords are reset or disabled upon transition. This step helps to prevent unauthorized access to the system and its data. Prior to the transition, users should be notified to change their passwords to a temporary password that will be provided to them. During the transition, the new contractor or system owner should then require all users to create new, secure passwords.

1. Account Transition and Disablement
   * Once the inventory and password security measures have been addressed, the next step is to identify which accounts will be transitioned and which accounts will be disabled. The transition plan should specify the individuals responsible for overseeing the transfer of accounts and passwords to ensure a smooth transition.
   * In cases where accounts are to be disabled, the transition plan should detail the process and procedures for disabling accounts, ensuring that the access rights of terminated employees, contractors or third-party vendors are revoked immediately.

1. Table of User Accounts
   * The transition plan should provide a table of all user accounts to be transitioned or disabled. This table should include the username, the associated email address, and the corresponding privileges or access rights. The table should also indicate whether the account will be transitioned or disabled, along with any specific transition instructions.

In summary, the transition of user accounts and passwords is an essential aspect of the property transition plan for the Dispatch Directory System project. By following a comprehensive inventory, password security measures, account transition and disablement procedures, and providing a table of user accounts, a smooth and secure transition can be achieved.

6.11.8. Knowledge Transfer

Documentation/Manuals:

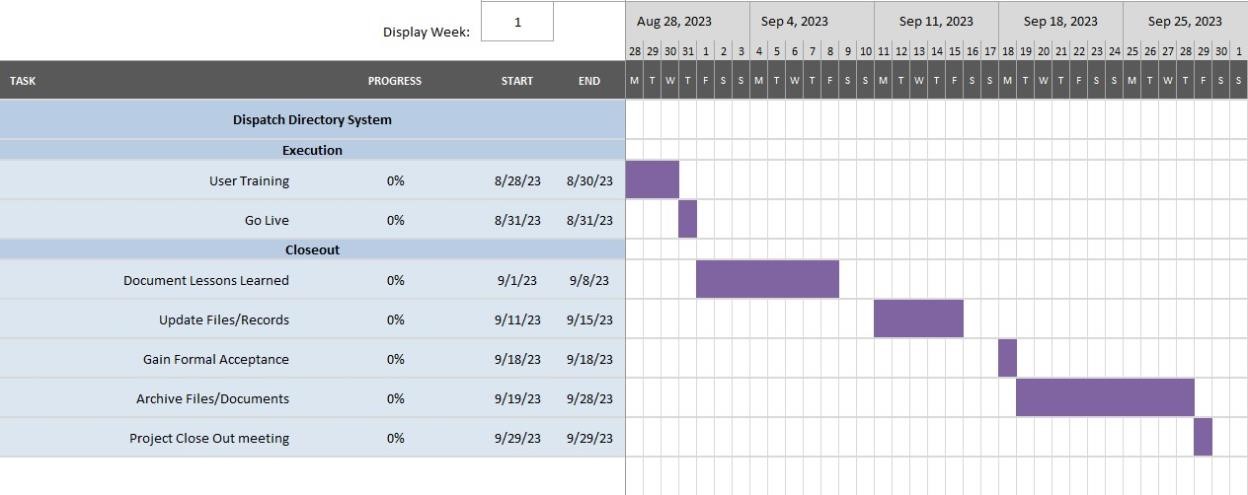
* + - * The project team and senior developer will provide documentation and manuals to the CREST SME.
      * The documentation will include a project overview, system architecture, functional requirements, technical specifications, and other relevant documentation that can help the CREST team better understand the system and how it works.
      * The manuals will provide step-by-step instructions on how to perform specific tasks related to the system.

Training:

* + - * The CREST SME will receive one-on-one training from the project team and senior developer to ensure they fully understand the system and its processes.
      * The CREST SME will also receive access to online training materials and resources that can help them further develop their knowledge and skills related to the system.
      * The CREST SME will be responsible for cascading the information to the CREST staff as they do not have to be trained in an actual class or accommodate scheduled classes due to the fast-paced environment.

As part of the Knowledge Transfer Plan, regular check-ins and meetings will be scheduled between the project team, senior developer, and CREST SME to ensure that the transfer of knowledge is successful and that any questions or issues are addressed in a timely manner. Additionally, any updates or changes to the system will be documented and shared with the CREST team to ensure they have access to the most up-to-date information.

* + 1. Schedule



*Figure 6.11—1: Transition Out Plan Schedule*

* + 1. Handover and Acceptance

The handover and acceptance process will begin with the completion of the transition plan, which will include all required documentation and deliverables. The project team will then schedule a formal handover meeting with the project sponsor and other relevant stakeholders to review the transition plan and ensure that all requirements have been met.

During the handover meeting, the project team will present the completed transition plan and all required documentation and deliverables to the project sponsor and other relevant stakeholders. The project sponsor and stakeholders will then review the materials and discuss any outstanding issues or concerns.

Once all issues have been resolved, the project sponsor and stakeholders will sign the formal acceptance document, which will serve as evidence that the handover has been completed successfully. The acceptance document will also include a checklist of all required deliverables and documentation, along with the signatures of all stakeholders who have reviewed and approved the materials.

The handover and acceptance section will also outline the process for resolving any outstanding issues or concerns that may arise after the handover is complete. This may include the use of a formal dispute resolution process or the implementation of corrective actions to address any identified deficiencies.

Overall, the handover and acceptance section of the contract transition out plan will provide a clear and detailed roadmap for completing the handover process and ensuring that all stakeholders are satisfied with the results.