## 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

**Overall Approach:**

The approach for the Transition Out plan for the Dispatch Directory System Project will be a phased transition approach since there is a need for continuity and minimal disruption to ongoing operations. This approach allows for a gradual and systematic transfer of knowledge, resources, and responsibility to the new team, minimizing the risk of downtime and service interruption.

The transition approach will include the following steps:

1. Communication Plan: The communication plan will ensure that all stakeholders are

aware of the transition plan, timelines, and expectations for the transition.

1. Transition Planning: The transition plan will be developed in coordination with the CREST team, and it will include a detailed timeline of all activities that need to be completed during the transition.

1. Knowledge Transfer: Knowledge transfer will occur through various means, such as documentation, instruction manuals, as-built documents, and formal training classes, to ensure that the CREST team has the necessary skills and knowledge to support the system.

1. Staffing: During the transition, the project team will scale down their staff to a

minimum level required to support the knowledge transfer and transition activities.

**Timeline:**

The transition out plan for this project involves a comprehensive schedule of activities that are necessary to successfully transition from the incumbent contractor to the CREST team. The transition plan is broken down into two main phases, execution and closeout.

The execution phase includes user training and go-live events that are scheduled from August 28th to August 31st. The closeout phase involves document lessons learned, update files/records, gain formal acceptance, archive files/documents, and project closeout meeting.

These activities will be conducted from September 1st to September 29th. The timeline provides a detailed schedule for each activity to ensure timely completion of all transition activities. The success of the transition plan will depend on the careful planning and execution of each activity as outlined in the timeline.

**Assumptions:**

The following assumptions will be made for the transition approach:

1. The CREST SME will be available onsite or via online meeting to participate in the transition and receive knowledge transfer.

1. The project team will provide all necessary documentation, training, and instruction

manuals to the CREST SME to facilitate knowledge transfer.

1. TELUS will provide all necessary equipment and software licenses for the CREST team

to support the system.

1. The CREST team will have the necessary skills and knowledge to support the system

after the completion of the transition.

6.11.3. Transition Team Organization

**Roles and Responsibilities:**

1. **Transition Project Manager (TPM):** Overall responsible for the success of the transition. The TPM will manage the transition team, ensure timely completion of transition activities, coordinate with the customer, and ensure compliance with the transition plan.
2. **Developers/Technical Lead (TL):** Responsible for providing technical expertise on the project. The Developers/Technical Lead will work closely with the project team to understand the system and develop a plan for the transition. The TL will also be responsible for coordinating with the new contractor to ensure a smooth transition of technical knowledge and expertise.
3. **Subject Matter Experts (SMEs):** Responsible for providing subject matter expertise on specific areas of the project. The SMEs will work closely with the developers, project team and the CREST team to ensure a smooth transition of knowledge and expertise.
4. **Quality Assurance (QA) Lead:** Responsible for ensuring that all deliverables meet the quality standards set forth in the transition plan. The QA Lead will work closely with the TPM to develop quality metrics and ensure that all transition activities are completed to a high standard.
5. **Project Team Members:** Responsible for providing support with knowledge and expertise on the system. They will work closely with the TPM, developers, SME, and CREST team members to ensure a smooth transition of knowledge and expertise.

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| Role | Responsibilities |
| Transition Project Manager | Overall responsible for the success of the transition. Manage the transition team, ensure timely completion of transition activities, coordinate with the customer, and ensure compliance with the transition plan. |
| Developers/Technical Lead | Responsible for providing technical expertise on the project. Work closely with the project team to understand the system and develop a plan for the transition. Coordinate with the new contractor to ensure a smooth transition of technical knowledge and expertise. |
| Subject Matter Experts | Responsible for providing subject matter expertise on specific areas of the project. Work closely with the developers, project team, and the CREST team to ensure a smooth transition of knowledge and expertise. |
| Quality Assurance Lead | Responsible for ensuring that all deliverables meet the quality standards set forth in the transition plan. Work closely with the TPM to develop quality metrics and ensure that all transition activities are completed to a high standard. |
| Project Team Members | Responsible for providing support with knowledge and expertise on the system. Work closely with the TPM, developers, SME, and CREST team members to ensure a smooth transition of knowledge and expertise. |

*Table 6.11—1: Roles and Responsibilities*

6.11.4. Workforce Transition

The workforce transition is a critical aspect of the transition out plan for the Dispatch Directory System project. In order to ensure a smooth and efficient transition, it is essential to determine and communicate the workforce plan of time.

As part of the transition team, the Transition Project Manager will work closely with both the incumbent and new contractors as well as the customer to determine the best course of action for the workforce. This may include retaining current staff, transitioning staff to the new contractor, or hiring new staff altogether.

Communication will be key in this process, as the workforce must be informed of any changes in a timely and respectful manner. The Transition Project Manager will work closely with HR and management to ensure that all staff are aware of their options and are provided with the necessary support throughout the transition process.

In addition, any necessary training or re-training will be provided to ensure that the workforce is fully equipped to continue providing high-quality services during and after the transition period. The workforce transition plan will be regularly reviewed and updated as necessary to ensure that the project is successfully completed on time and within budget.

6.11.5. Workforce Execution During Transition

During the transition period of the Dispatch Directory System project, work will still need to be performed they are as follows:

∙ **User Training:** This will involve the development and delivery of training materials to educate users on the new system. The training sessions will likely be held over a period of three days and will involve both classroom and hands-on training.

∙ **Go Live:** This will be the actual launch of the new system. The team will need to ensure that all systems are in place and functioning correctly before the system is made available to users. This will likely involve final system testing and ensuring that all data has been migrated correctly.

∙ **Document Lessons Learned:** This phase will involve documenting the lessons learned during the project. This includes identifying areas where the team performed well, as well as areas where there is room for improvement. The document will be used to help inform future projects and ensure that best practices are adopted moving forward.

∙ **Update Files/Records:** During this phase, the team will be responsible for updating all relevant files and records to reflect the completion of the project. This may involve archiving certain documents or updating contracts and agreements with new information.

∙ **Gain Formal Acceptance:** This phase involves formally gaining acceptance from the customer that the transition has been completed successfully. The team will need to ensure that all deliverables have been met and that the customer is satisfied with the new system.

∙ **Archive Files/Documents:** This phase involves archiving all project-related files and documents. This may include contracts, agreements, project plans, and other relevant materials.

∙ **Project Close Out Meeting:** The final phase of the transition will involve a project close out meeting with all stakeholders. This will be an opportunity to discuss the project as a whole, including any successes or areas for improvement, and to ensure that all outstanding issues have been resolved.

6.11.6. Subcontracts

There are no existing contracts or subcontract agreements related to this project. Therefore, no transition of contracts or related agreements is required.

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:

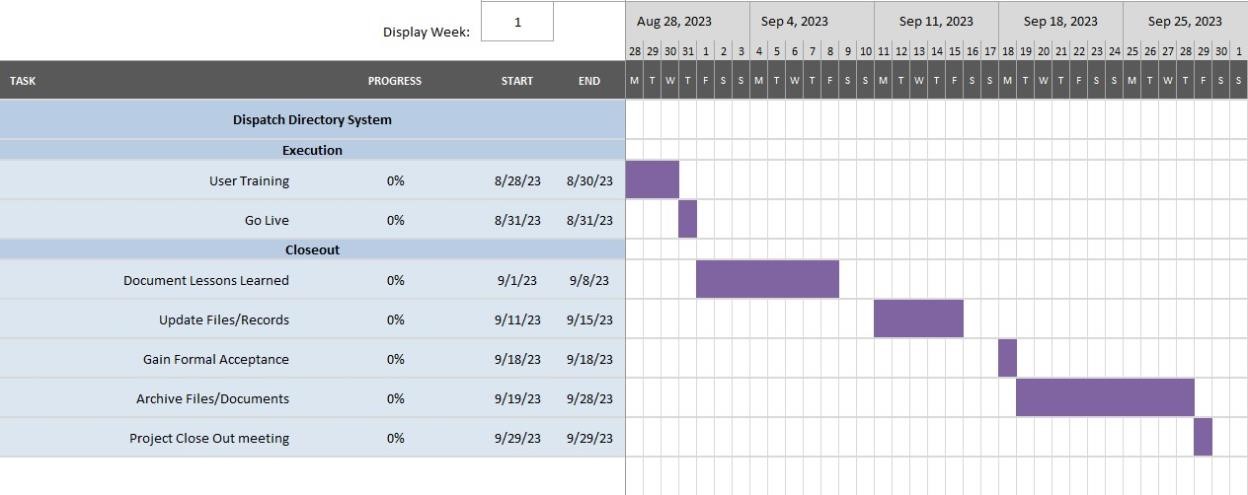
* + - * The project team and senior developer will provide documentation and manuals to the CREST SME.
      * The documentation will include a project overview, system architecture, functional requirements, technical specifications, and other relevant documentation that can help the CREST team better 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.