



# Cutover Strategy (with details becomes Cutover Kickoff)

SAP  
February 14, 2023

PUBLIC

# Agenda

1. Cutover Strategy
2. Timeline
3. Go Live Acceptance Criteria
4. Cutover Organization and Responsibilities
  - Legacy Team
  - Migration Team
  - Business Team
5. Cutover Schedule
6. Cutover Simulations
7. Cutover Communications
8. Contingency Plan
9. Implementation Support
10. Logistics

# Cutover Strategy

- **Time constraints?**
- **Big bang or phased?**
- **Sequence?**
- **Parallel system with legacy?**

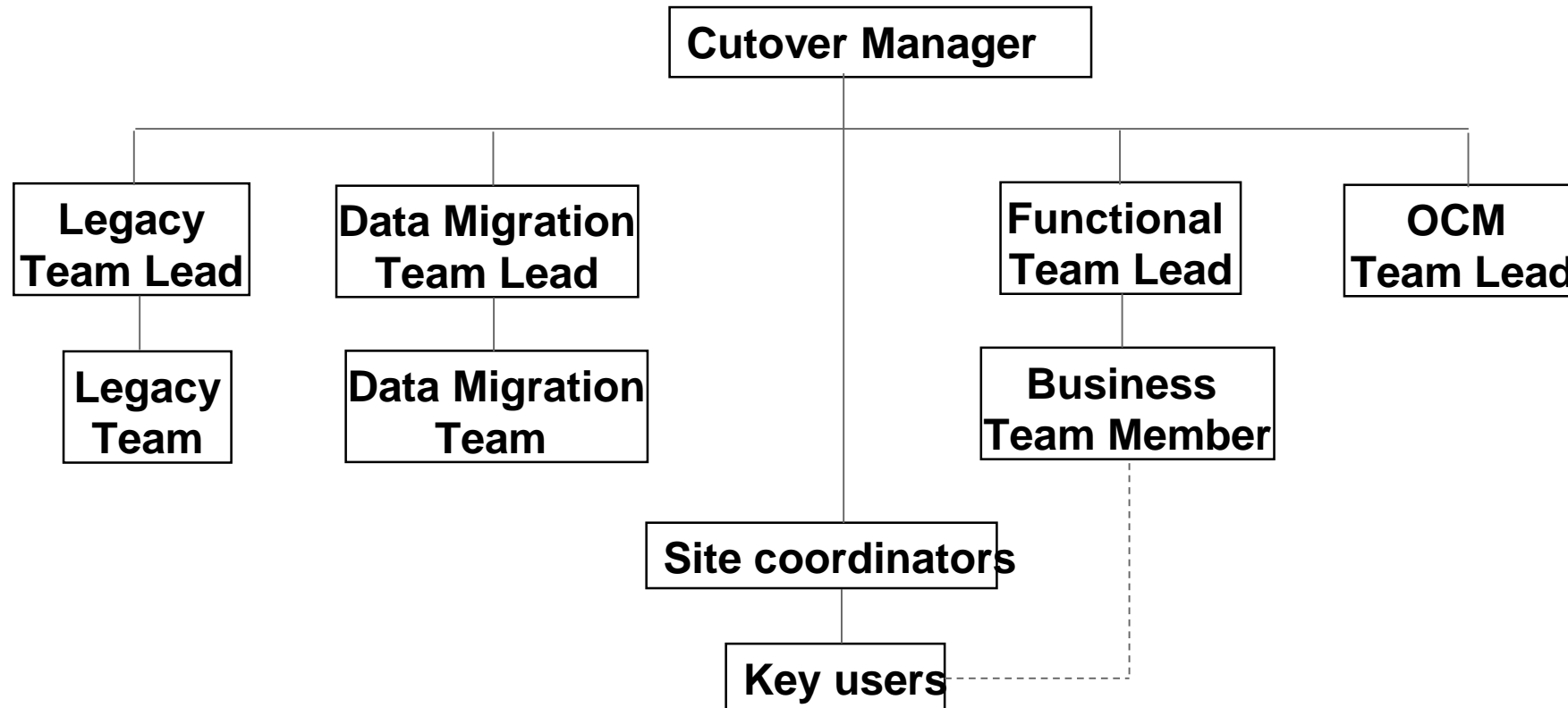
# High Level Cutover Timeline

Mo				October				November				December				January			
W k		3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
1	Business Preparation																		
2	Production Environment Preparation							✔		✔	Cutover Simulations								
3	Project Team Preparation																		
4	Master Data Migration																		
5	Cutover Preparation																		
6	Legacy Changes and Shutdown																		
7	Transaction Data Migration																		
8	Key Processes Execution																		
9	Legacy Shutdown																		
10	Security access enabled																		
11	Go Live																		
12	Go Live Support – Hyper Care																		
13	Go Live Support – Long Term																		

# Go Live Acceptance Criteria

- **The business identifies the acceptance criteria during Realization in order to:**
  - Maintain the focus on going live on time
  - Focus project team efforts on criteria tasks
- **Acceptance criteria needed for major milestones**
  - To begin Production Cutover, for example:
    - Acceptable levels of passing for Integration Tests
    - Acceptable levels of trained and certified users
    - Acceptable levels of open issues
    - Acceptable performance criteria
  - To accept Master Data, for example:
    - Planned accuracy percent of data load by object
  - To accept Transactional Data, for example:
    - Planned accuracy percent of data load by object
    - Key processes that execute correctly in Production post migration
    - Meeting acceptance criteria allows move to next steps

# Cutover Organization



# Roles and Responsibility

Cutover Manager	<ul style="list-style-type: none"> <li>■ Creates and maintains master cutover schedule</li> <li>■ Defines organization and logistics for cutover</li> <li>■ Manages cutover issues and their resolution</li> <li>■ Ensures communication to all stakeholders</li> </ul>
OCM Team Lead	<ul style="list-style-type: none"> <li>■ Provides formal communications</li> </ul>
Team Leads	<ul style="list-style-type: none"> <li>■ Create cutover schedule for team as input to the master cutover schedule</li> </ul>
Legacy Team	<ul style="list-style-type: none"> <li>■ Extract data</li> <li>■ Provide reports to aid in validation</li> </ul>
Data Migration Team Lead	<ul style="list-style-type: none"> <li>■ Creates cutover schedule for data migrations as input to the master cutover schedule</li> <li>■ Manages data loads prior to cutover</li> <li>■ Documents results of each data load</li> </ul>
Data Migration Team	<ul style="list-style-type: none"> <li>■ Execute migrations</li> <li>■ Provide aid in validation</li> </ul>
Business Team Members	<ul style="list-style-type: none"> <li>■ Validate converted data and resolve errors</li> <li>■ Identify and execute key process tests</li> </ul>
Project Team	<ul style="list-style-type: none"> <li>■ Hyper care period support</li> </ul>
Site Coordinators	<ul style="list-style-type: none"> <li>■ Manages site readiness</li> <li>■ Manages site issues and their resolution</li> </ul>
Key Users	<ul style="list-style-type: none"> <li>■ First line support</li> </ul>

# Long Term Responsibility

- **Inventory of legacy systems**
  - Identify systems to sunset
  - Identify any modifications needed
- **Inventory of batch processes to reschedule or cancel**
- **Identification of security access requirements**
  - During cutover
  - Post Go Live



# Migration Team Responsibility

- **Determine whether migration is:**
  - One time
  - Multiples for a file with deltas
  - Determine approach to dual maintenance, as required
- **Determine sequence of migrations**
- **Document migration quality tracking in Migration Quality Tracking spreadsheet**
  - Track record counts, validation works, and time requirements
  - Create an individual spreadsheet for each data load including unit test, simulation loads, training migration, etc.
- **Aid the business to cleanse and validate the data**

# Migration Team Responsibility

- **Purpose**
- **Objectives & Goal**
- **Migration Plan Strategy & Methods**
- **Planning & Accelerated SAP (SAP Activate) Phases**
- **Migration Planning High Level Activities**
- **Go-Live Scope of Activities & Migration**
- **Key Team Members Worksheet**
- **Migration/Cutover Schedules**
- **Top Assumptions**

# Purpose

- **The Migration Plan identifies the activities to be performed during the cutover process from getting started through execution of all related tasks: Planning, Acceptance and Execution.**
- **The plan further defines the activities required to facilitate a smooth transition into production for additional SAP functionality.**
- **The major activities of Migration are the migration of master data and getting the Production SAP system functionally and technically ready.**
- **The Migration Plan template is to be re-usable for each separate Migration effort (release schedule).**

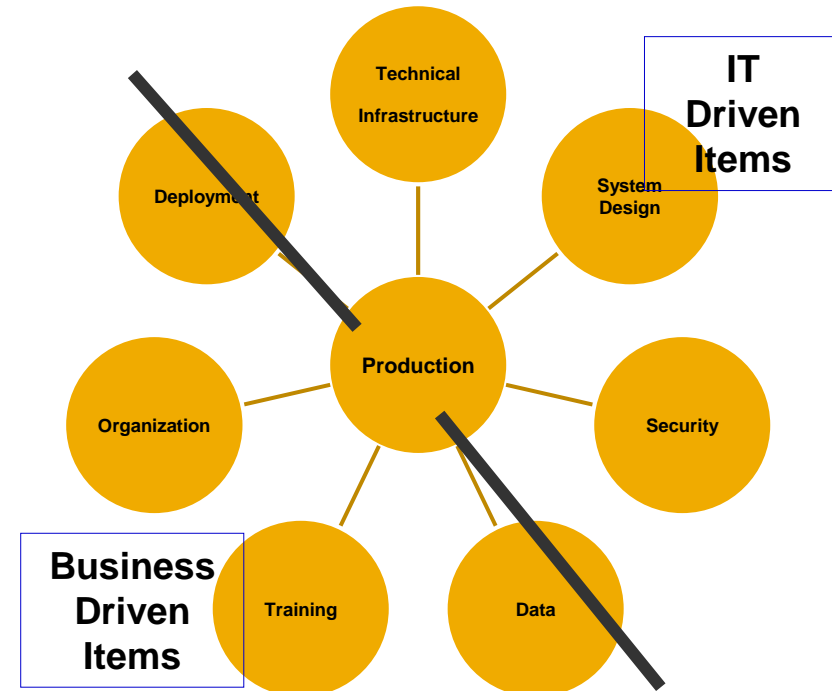
# Objectives and Goals

## Objectives

- Establish the Process for the Actual Go-Live Transition
- Define the Approach and Framework for executing the Cutover
- Establish Approval Criteria for Formal Cutover Acceptance
- Define Project Team Activities, Roles, & Responsibilities
- Define Organization Team Activities, Roles & Responsibilities
- Define Project Management Activities, Roles and Responsibilities

## Goal

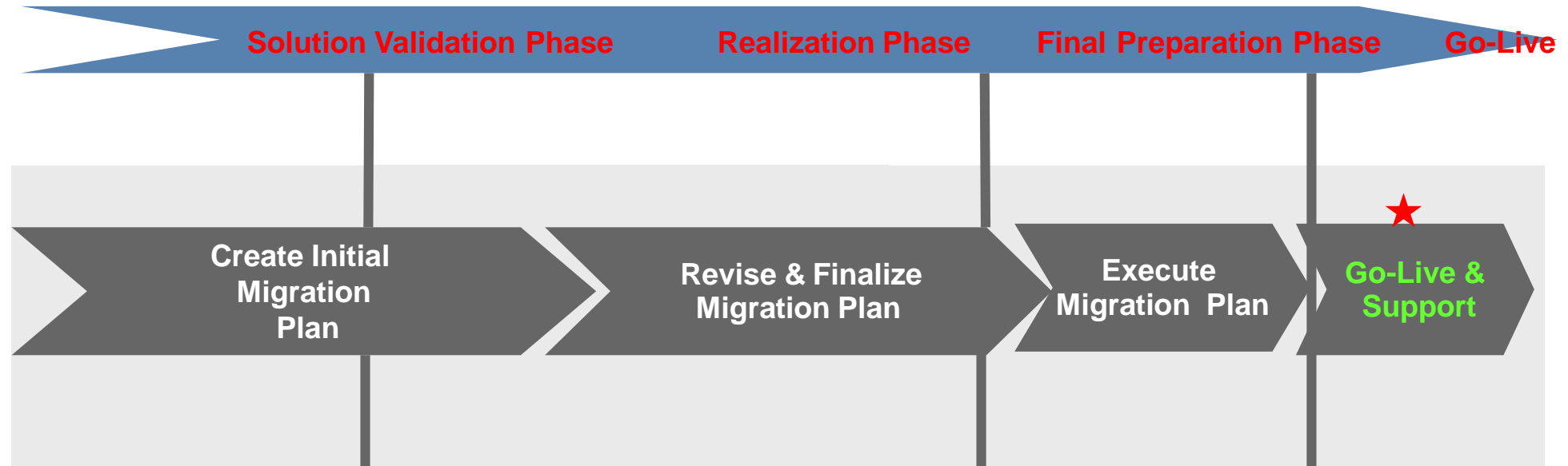
The Goal is plan to ensure a smooth transition to production



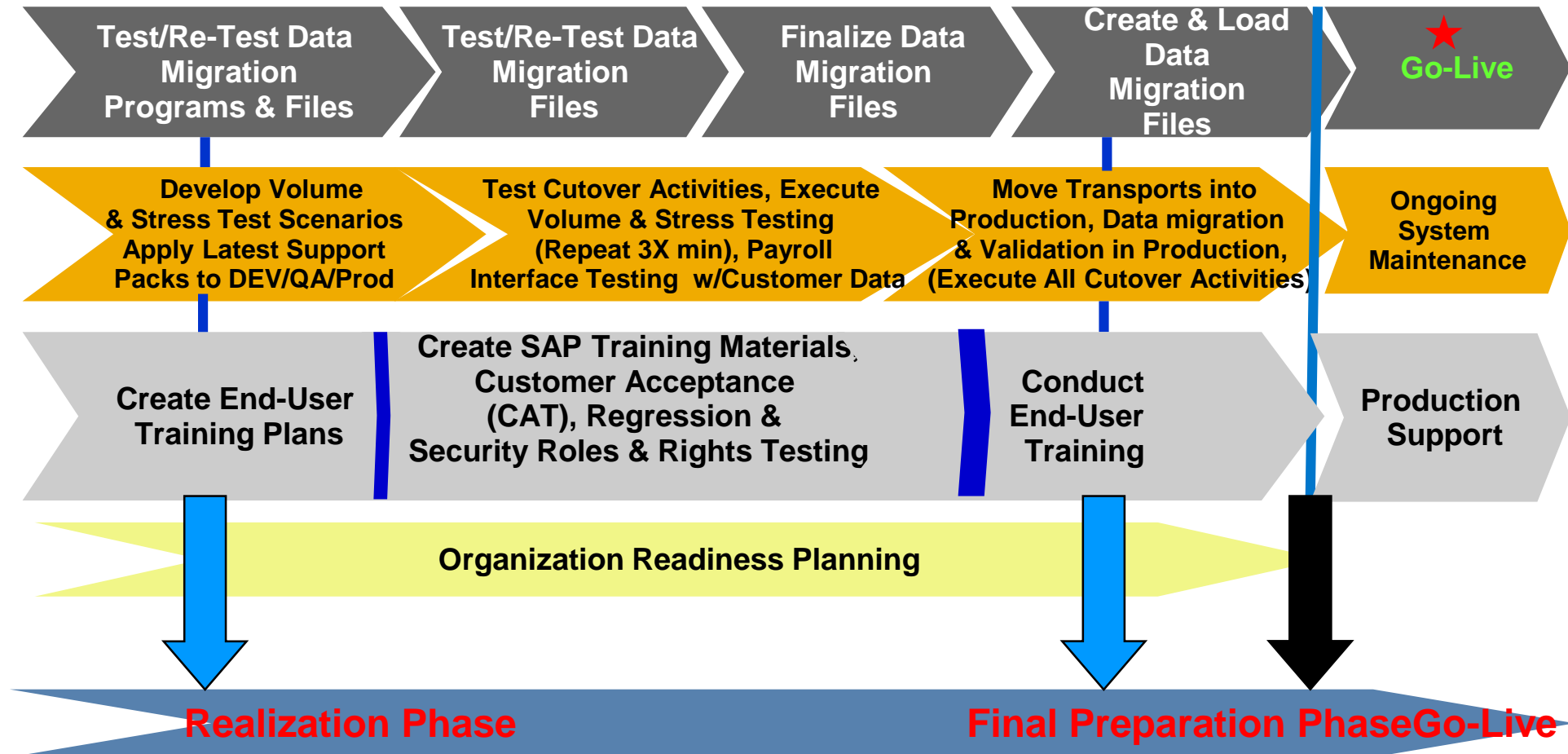
# Migration Plan Strategy & Methods

- **For each SAP Project Schedule, (release) there will be a separate set of Migration documents created using the following Migration templates:**
  - Cutover Schedule
  - Cutover Checklist
  - Final Cutover Checklist
- **A Cutover Schedule will be maintained for each release schedule tracking all key area milestone dates to ensure all areas are coming together for the individual Migration effort.**
- **A Cutover Checklist will be created with all necessary detail and dependencies and tested/updated via the cutover simulations and lessons learned process.**
- **Acceptance criteria by key area will be defined for each Migration effort using the Final Cutover Acceptance Checklist template.**
- **Lessons Learned from each Migration effort are to be evaluated and included as updates to the Migration Plan going forward.**

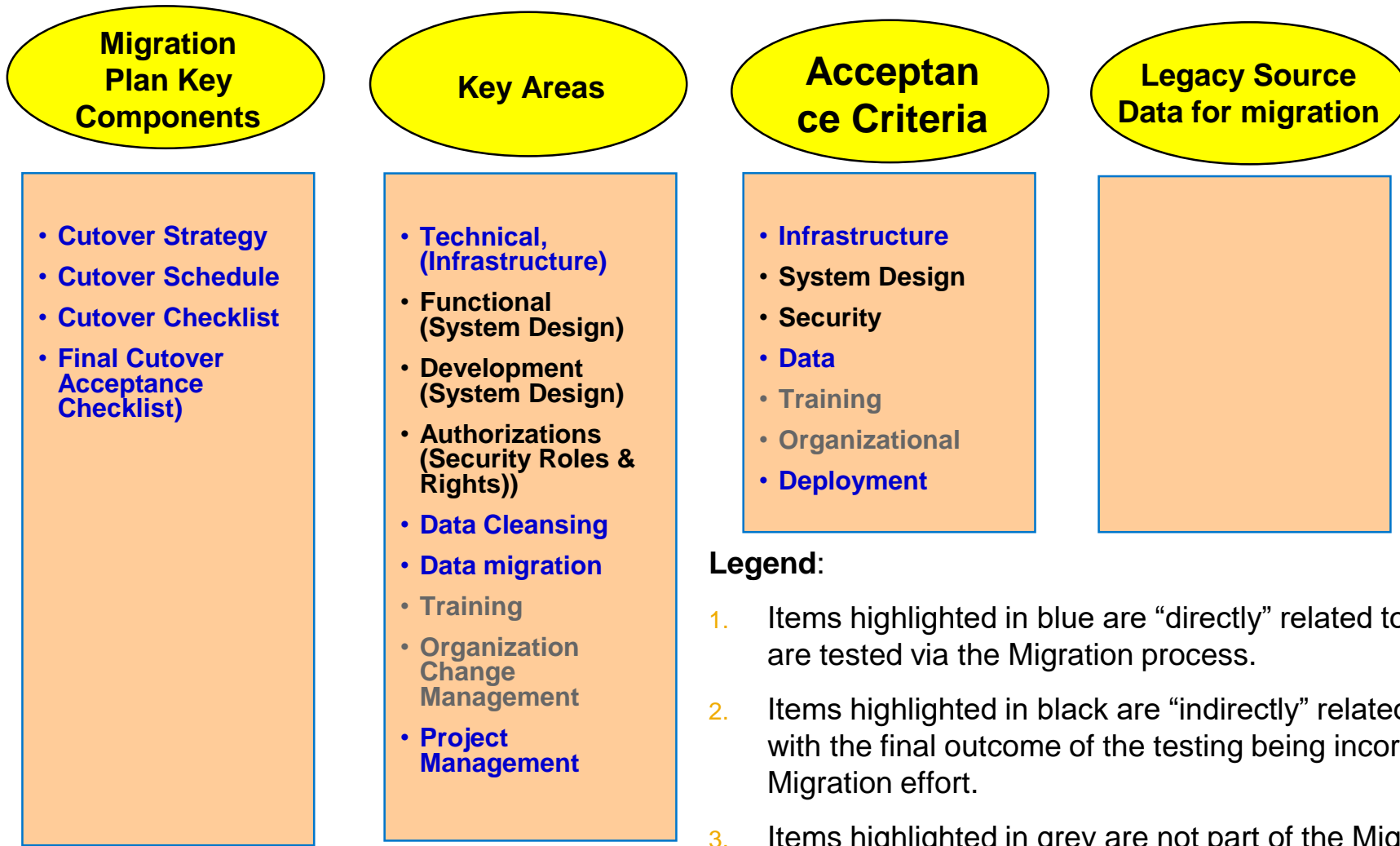
# Migration Planning & Accelerated SAP Phases



# Migration Planning High Level (Activities)



# Go-Live Scope of Activities



## Legend:

1. Items highlighted in blue are “directly” related to Migration & are tested via the Migration process.
2. Items highlighted in black are “indirectly” related to Migration with the final outcome of the testing being incorporated into the Migration effort.
3. Items highlighted in grey are not part of the Migration effort and are tracked to ensure the overall success of the implementation.



# Top Assumptions

- System design work (configuration and enhancements) in scope have been completed and integration tested end-to-end.
- Interfaces from SAP to external Customer systems in scope have been completed and integration tested end-to-end (with new data set), with receiving system resources confirming both receipt and acceptance. (Requires downstream systems (including those connected to XI) to be locked into SAP integration testing and acceptance schedule.)
- Additional development work (authorizations, reports, forms, migrations, etc.) in scope have been completed and tested.
- Data to be converted into the new SAP environment has been cleansed, validated and approved for migration into SAP.
- The cutover approval process is timely and is based on the approval criteria defined as part of the Migration plan for both the Business owners and Information Technology areas involved.
- Pre-requisite and parallel activities are completed and approved prior to the go-live (security roles and rights testing, customer acceptance testing, end-user training, organizational change management activities, etc.).
- Resource constraints will be managed based on priority, criticality and urgency.
- Each team involved retains the resources and skill sets required to complete the tasks related to their respective areas in the time needed.
- No historical data is part of migration/cutover process into SAP for the go-live.

# Business Responsibilities

- **The business identifies:**
  - Key personnel and staffing plans
  - New data requirements
  - Preparation for cutover
    - Business preparation activities
    - Process cut off milestones
  - Alternative business processes for transition periods
  - Acceptable business shut-down window
  - Key processes to execute in production after data migration
  - End user requirements
    - Training or certification requirements
    - Log on distribution logistics and requirements
    - Start up procedures
    - Business resources for cutover:
      - Key Users
      - Site Coordinators
- **The business is responsible for the data**
  - Cleansing
  - Validating
- **Determine dual maintenance requirements, if any**

# Cutover Schedule

- **Each functional, data, and technical team lead to maintain a list of cutover activities in Team Cutover Schedule**
  - Created before migration to QA box
  - Provided to Cutover Manager for use in QA build
  - Once provided to Cutover Manager, the Team schedules are no longer maintained, as there is only one Master Cutover Schedule
- **Cutover Manager merges the Team Schedules into the Master Cutover Schedule**
  - Executes merged schedule to build QA box, Prod box, simulation cutovers, and cutover to production
  - Updates schedule as needed to provide the most error-free cutover to production
  - Re-uses the schedule for each
- **The Master Cutover Schedule leverages MS Project's predecessor and successor functionality to enable forecasting of time requirements for cutover**

# Cutover Communications

Audience	Responsible	Method	Frequency
Project Team	Cutover Shift Manager	Project Schedule on shared drive Voice mail status	Minimum of hourly
Cutover Person Responsible	Cutover Shift Manager	Phone	As needed, two hours before needed
Steering Committee and Management	Cutover Shift Manager	Voice mail status	Minimum of every 4 hours
Site Coordinators	Cutover Shift Manager	Open teleconference line	Minimum of daily
Stakeholders	OCM Manager	Formal email	At pre-determined points

# Contingency Plan

- **Risks and mitigations for cutover**
- **Time required to restore legacy**
- **Position decision points for proceeding with next steps**
- **Identify acceptance requirements for each decision point**

# Implementation Support

- **Hyper care period**
  - Project team staffs cutover room for 2 weeks
  - Schedule developed for 24 x 7 support
  - Help Desk phone line coordination
- **Long Term**
  - Handover to Help Desk after 2 weeks

# Thank you.

Contact information:

**F name L name**

Title

Address

Phone number

Partner logo

THE BEST RUN 