Project Nexus: Detailed Implementation Plan & Inter-Departmental Standard Operating Procedures (SOP)

Version: 1.2
Date: September 27, 2025
Document Owner: Project Management Office (PMO)
Approval Required: Executive Director

1.0 Introduction and Purpose

Following the executive approval of the 'Project Nexus' proposal, this document serves as the definitive implementation plan and a guide to the inter-departmental standard operating procedures that will govern the project from the procurement phase through to post-launch support and benefits realization. The successful deployment of the new fleet management and logistics platform is a key strategic initiative, critically dependent on the seamless collaboration and clearly defined responsibilities of the key stakeholder departments. This plan provides a granular view of the tasks, deliverables, communication protocols, and escalation paths for the Frontline Operations Manager (Rolling Stock), the Procurement Officer, the HR & Safety Coordinator, and the Executive Director. This document is designed to be the single source of truth, superseding all previous informal discussions and preliminary drafts, and will be subject to formal version control as outlined below.

The primary objective of this document is to eliminate ambiguity and establish a robust framework for execution that ensures on-time, on-budget delivery. It aims to proactively address potential friction points between departments by defining clear lines of ownership and accountability. It will define the operational cadence through a detailed project schedule, establish a formal governance structure for decision-making, outline comprehensive risk mitigation strategies for potential challenges, and specify the tangible, data-driven criteria for phase-gate approvals. Adherence to the procedures outlined herein is mandatory for all personnel assigned to Project Nexus. Each department head is responsible for disseminating the relevant sections of this plan to their respective team members, ensuring a deep understanding of their roles and dependencies. The Project Management Office (PMO) is tasked with overseeing the execution of this plan, providing regular, data-driven status updates to the Executive Director and the project steering committee. This project directly aligns with the corporate strategic goals of Operational Excellence and Digital Transformation.

2.0 Phase 1: Vendor Selection & Procurement (Lead: Procurement Officer)

2.1 Overview
This initial phase covers all activities from the formalization of system requirements to the signing of a definitive, legally binding agreement with the selected software vendor. The Procurement Officer will lead this phase, ensuring all activities adhere to the highest standards of corporate governance and fiscal policies while securing the most favorable long-term value for the organization. This phase is foundational, as the choice of vendor and the terms of the agreement will directly impact the project's total cost of ownership, flexibility, and long-term success. Every decision made here will have cascading effects on all subsequent project phases.

2.2 Key Responsibilities of the Procurement Officer

- **Request for Proposal (RFP) Management:** The Procurement Officer is responsible for drafting, finalizing, and issuing the official RFP. This includes establishing a detailed vendor scoring matrix with weighted criteria (e.g., Technical Fit: 40%, Cost: 30%, Vendor Viability: 20%, Support Model: 10%), managing a formal vendor Q&A period via a central portal to ensure fairness and transparency, and chairing the evaluation committee to ensure an unbiased assessment of all submissions.
- **Vendor Due Diligence:** Conduct thorough financial, operational, and technical background checks on the shortlisted vendors. This process must include a review of their last three years of audited financial statements, confidential reference checks with at least three existing clients of similar scale, and a deep-dive assessment of their data security and compliance certifications (e.g., ISO 27001, SOC 2). It will also involve a technical review of their proposed architecture and disaster recovery capabilities.
- **Contract Negotiation:** Lead all multi-stage negotiations. This extends beyond initial pricing to cover critical long-term aspects such as data ownership and portability, exit clauses, intellectual property rights for any customizations, liability caps, data residency guarantees, a detailed Statement of Work (SOW), and clearly defined Service Level Agreements (SLAs) with financial penalties for non-performance. The goal is to maximize value, ensure predictability, and minimize long-term risk.
- **Legal Coordination:** Act as the primary liaison with the corporate legal department. This involves managing the redlining process and ensuring all contract terms are robust, compliant with international data privacy regulations (e.g., GDPR), and fully protect the organization's strategic interests, particularly concerning future scalability and technology changes.

2.3 Inter-Departmental Collaboration

- **Collaboration with Frontline Operations Manager:** The Procurement Officer will work directly with the Frontline Operations Manager in a series of structured workshops to translate the operational requirements into specific, measurable technical specifications within the RFP. The Operations Manager's formal sign-off on these requirements is mandatory before the RFP is issued.
- **Approval from Executive Director:** The final vendor recommendation—supported by

the scoring matrix, due diligence report, and the near-final contract—must be presented to the Executive Director for final review and signature. A formal business case, outlining the total cost of ownership and expected ROI, must accompany this recommendation. No contractual agreements can be made without this final executive approval.

3.0 Phase 2: System Configuration & User Acceptance Testing (Lead: Frontline Operations Manager)

3.1 Overview
Once a vendor is selected and the contract is signed, the project moves into the implementation phase. The Frontline Operations Manager (Rolling Stock) will lead this phase, acting as the primary business stakeholder and the ultimate authority on the system's operational suitability. Their core responsibility is to ensure the configured system not only meets the documented requirements but is also practical, efficient, and rigorously tested by end-users before deployment.

3.2 Key Responsibilities of the Frontline Operations Manager (Rolling Stock)

- **Business Process Mapping:** Lead workshops with the vendor's implementation team and internal subject matter experts to create detailed "As-Is" and "To-Be" workflow diagrams using Business Process Model and Notation (BPMN). This process is critical for identifying operational gaps and defining necessary system configurations or, if unavoidable, customizations, which must then go through a formal change request process.
- **Data Migration Oversight:** Act as the business owner for the data migration workstream. This includes overseeing the process of cleansing, transforming, and migrating data from legacy systems. The Manager is responsible for approving the formal Data Migration Strategy document and for validating data integrity through a series of structured validation tests and mock cutovers before signing off on the final migrated dataset.
- **User Acceptance Testing (UAT) Management:** Develop a comprehensive UAT plan that includes explicit entry and exit criteria. Create detailed test scripts covering all critical operational use cases, including edge cases, negative testing, and failure scenarios. Assemble and manage a cross-functional team of end-users to execute the tests and meticulously log all defects in a shared tracking system (e.g., Jira). The Manager is responsible for the final UAT sign-off, which is a formal gate for entering the deployment phase.
- **Operational Readiness Review:** Before the go-live date, the Manager must formally certify that the system, as configured and tested, is ready for a live production environment. This includes confirming that all necessary operational reports have been configured and that support processes are in place.

3.3 Inter-Departmental Collaboration

- **Collaboration with HR & Safety Coordinator:** The Operations Manager will provide the HR & Safety Coordinator with early access to the UAT environment. This

"train-the-trainer" access is crucial for the HR team to begin developing accurate training materials and updating safety SOPs based on the finalized, tested workflows. The Operations Manager must provide formal approval of all training materials to ensure operational accuracy.
- **Reporting to Executive Director:** Any proposed changes to the project scope that are identified during this phase which have a material impact on budget or timeline must be formally documented through a change request process, including a thorough impact analysis, and submitted to the Executive Director for approval.

4.0 Phase 3: Training & Change Management (Lead: HR & Safety Coordinator)

4.1 Overview

This phase focuses on the most critical element of the project's success: preparing the organization's personnel for the transition. The HR & Safety Coordinator is responsible for ensuring that all employees are not only adequately trained but are also informed, engaged, and supported throughout the change process to minimize disruption, mitigate resistance, and drive enthusiastic adoption of the new platform. A failure in this phase will lead to a failure of the project, regardless of technical success.

4.2 Key Responsibilities of the HR & Safety Coordinator

- **Training Program Development:** Design and develop a role-based, multi-format training curriculum. This will include mandatory classroom-style instruction for complex tasks, self-paced e-learning modules with embedded quizzes for general knowledge, and quick-reference guides (QRG) for at-a-glance support. A "train-the-trainer" program will be established to certify departmental super-users who will provide first-line support.
- **Safety Protocol Updates:** Review and rewrite all relevant safety and operational SOPs. This is a formal process that requires version control, a documented review cycle with the Operations Manager, and an official distribution and acknowledgment process for all affected staff, tracked via a learning management system, to ensure 100% compliance and auditability.
- **Internal Communications:** Develop and execute a strategic project communications plan. This plan will outline a cadence of updates, including monthly project newsletters, bi-weekly "What's Coming" emails leading up to launch, and organizing town halls with Q&A sessions featuring the Executive Director and other leads to build buy-in and address concerns transparently.
- **Change Management & Impact Mitigation:** Act as the primary point of contact for employee concerns. Proactively identify potential areas of resistance through stakeholder analysis and surveys, and work with managers to address them. This includes reinforcing the project's benefits and ensuring a smooth transition by managing employee expectations and celebrating small wins along the way.

4.3 Inter-Departmental Collaboration

- **Collaboration with Frontline Operations Manager:** The HR Coordinator will work closely with the Operations Manager to create a master training schedule that minimizes

disruption to critical frontline operations. The Operations Manager will provide final approval on the content of all training materials to ensure operational accuracy and relevance to the daily tasks of the staff.

5.0 Phase 4: Go-Live Deployment and Post-Launch Support

5.1 Overview

This phase represents the culmination of the project, where the new system is deployed into the live production environment. It requires meticulous planning, a detailed, hour-by-hour cutover weekend schedule, and a coordinated, "all-hands-on-deck" approach from all stakeholder departments to ensure a seamless and successful transition with minimal operational downtime.

5.2 Go-Live Responsibilities by Department

- **Frontline Operations Manager (Rolling Stock):**
  - Develops, socializes, and executes the final, hour-by-hour cutover plan. This includes establishing a physical "command center" for the go-live weekend.
  - Manages the operational teams during the cutover to ensure all initial data is entered correctly and core business processes are running as expected post-deployment.
  - Acts as the lead for the 30-day post-launch "hyper-care" period, chairing a daily triage meeting to prioritize bugs and enhancement requests with the vendor.
- **Procurement Officer:**
  - Confirms that the go-live milestone has been successfully met according to the specific, measurable criteria defined in the contract, authorizing the release of the final major payment to the software vendor.
  - Formally transitions the vendor relationship from the implementation team to the long-term support and account management team, ensuring a clear hand-off of all support procedures and escalation contacts.
- **HR & Safety Coordinator:**
  - Provides scheduled, on-site, "floor-walker" support during the first two weeks of operation to assist users with real-time questions and reinforce training concepts.
  - Launches a formal post-implementation survey at the 30-day mark to gather structured user feedback and identify any additional training, communication, or system enhancement needs for future phases.

5.3 Contingency & Rollback Plan

A formal Go/No-Go decision meeting, chaired by the Executive Director, will be held 48 hours before the scheduled cutover. A detailed rollback plan, tested during a mock cutover, will be prepared. This plan will outline the specific technical steps and responsibilities required to revert to the legacy system within a 4-hour window should a critical, unresolvable failure occur during deployment. The specific triggers for this decision will be pre-defined and agreed upon.

5.4 Post-Launch Governance

A weekly post-launch review meeting will be held for the first three months, chaired by the PMO. Attendance is mandatory for the Operations Manager, Procurement Officer, and HR

Coordinator to discuss system performance metrics, user adoption rates, open support tickets, and any outstanding issues that could impact the project's long-term success.

6.0 Project Governance, Risk Management & Executive Oversight

6.1 Governance Structure

A Project Steering Committee will be established to provide strategic oversight and serve as the primary decision-making body. The committee will be chaired by the Executive Director and will include the PMO lead, the Frontline Operations Manager, the Procurement Officer, and the HR & Safety Coordinator. The committee will operate under a formal charter and will meet monthly to review progress against the plan, approve major decisions and change requests, and provide strategic guidance to remove roadblocks.

6.2 Risk Management and Escalation

All project risks will be logged in a central risk register, tracked by the PMO, and assigned an owner and a detailed mitigation plan. Risks will be scored based on a formal impact vs. probability matrix. Any risk that is assessed as "High" in terms of its potential impact on budget, schedule, or operational continuity (e.g., critical data migration failure, vendor delays) must be escalated immediately to the Steering Committee. The Executive Director holds the ultimate authority to make decisions on high-stakes issues, such as re-allocating significant budget or adjusting the project's go-live date.

6.3 Key Performance Indicators (KPIs) for Executive Review

The success of Project Nexus will be measured against the tangible business goals outlined in the initial proposal. The PMO will track and present the following KPIs, with their data sources, to the Executive Director in a quarterly business review post-launch:

- **Fleet Operational Availability (%):** Sourced from the new system's reporting module. Measured by system-generated uptime reports against the pre-project baseline. Target: 20% increase within 12 months.
- **User Adoption Rate (%):** Sourced from system analytics. Measured by weekly logins and completion of key workflows by all licensed staff. Target: 95% of relevant staff active weekly by month three.
- **Reduction in Manual Data Entry Errors:** Sourced from formal audits. Measured by a quarterly audit of maintenance and logistics logs comparing error rates pre- and post-implementation. Target: 75% reduction.
- **Return on Investment (ROI):** A comprehensive financial calculation, including all project costs and quantified efficiency gains, to be completed and presented 18 months post-launch.

6.4 Final Project Sign-off

The project will be considered officially complete when all functionalities have been deployed, the system has demonstrated stable performance for six consecutive months with no priority-1 open tickets, and the pre-defined KPIs have met their stated targets. The final project closure report, including a lessons-learned section and a final budget reconciliation, must be formally reviewed and signed off by the Executive Director.