

One Page Overview of A Business Change Project Plan

KEY AREAS		KEY POINTS TO CONSIDER							
BUSINESS / IT ALIGNMENT	PROJECT GOALS What are the goals of this project?	OWNER Who is the business owner of the project?	STRATEGY Aligned to business goals and strategy?	RISKS Key risks identified and mitigation plans?	DEPENDENCIES Other project dependencies?	DUPLICATION Duplication with other projects?	COSTS What is the CBA & ROI in business case?	ASSUMPTIONS Have assumptions in cost, timescales, impacts and interfaces been discussed and validated?	
	STAKEHOLDERS Which stakeholders are impacted?	SCOPE What is in scope and not in scope?	CAPABILITIES Internal capabilities to achieve success?	SUCCESS FACTORS CSF's and benefits agreed & aligned?	BENEFITS • Have the proposed benefits validated? • How will they be measured?		TIMING Why does this project now?	RECOMMENDED OPTIONS • A recommended option to go forward? • Have all other options been discussed?	
BUSINESS IMPROVEMENT	CASE FOR CHANGE • Demonstrate the need for change • What will happen nothing is done? • What are others doing in the marketplace?	PROPOSED CHANGE • State aims of the proposed change? • Contrast present and future states • State benefits • Timescale and major milestones?	PROJECT APPROACH • Who will lead? • Who else would be involved? • What approach would be taken • What staff will be required?	GOVERNANCE • How will accountability be managed? • At what stages will there be gateway reviews?	PROJECT MANAGEMENT ACTIONS				
					ARTEFACTS • Business Case • Create Project Brief and PID • Document current solution and issues	PROCESS • Perform process mapping • Perform gap analysis • Best practices?	OPTIONS • Identify options going forward • Review proposed future solution • Identify quick wins"	TRANSITION • Develop transition strategy • Develop schedule for next stage	PROJECT BOARD Review business case and other project documents with project board
DESIGN THE BUSINESS CHANGE	PACKAGE ARCHITECTURE VALIDATION • Review technical architecture • Determine package infrastructure • Provide initial training • Install the package • Estimate usage volumes and scaling options • Ensure installation architected for high availability • Review and baseline technical architecture model		PACKAGE REVIEW • Explore the package • Validate business requirements • Map requirements to package • Compile package gap document and identify gap solutions	IMPLEMENTATION OPTIONS • Identify business process options • Evaluate data migration strategies • Review deployment approach • Evaluate systems interfaces • Evaluate delivery increment options		IMPLEMENTATION DESIGN PLANS • Define implementation increments • Define increment acceptance criteria • Define change management plan • Define communications plan • Define training approach and plan • Compile delivery increments plan • Review delivery increments plan • Develop requirements traceability matrix • Baseline project deliverables • Develop schedule for next stage • Review project status with project board		PACKAGE IMPLEMENTATION • Conduct user and team training • Define iterations • Define test approach • Review and baseline iteration plan • Develop scenarios & map scenarios to package • Specify and prototype reports • Specify external interfaces • Build and review package prototype • Design systems and integration test cases • Confirm scope of future iterations • Data Migration Design • Review data acquisition	
	INTEGRATION BUILD • Build reports • Design and build migration components • Design and build external interfaces • Optimise performance • Complete unit integration testing • Review and baseline build • Deliver build for testing			SYSTEM TEST • Define test scripts • Review test case/requirement coverage • Develop automated scripts • Establish external test data sets • Execute tests and log results • Investigate unexpected results • Estimate, prioritise, & schedule testing changes		ITERATION REVIEW • Review system test results for current iteration • Confirm scope of future iterations • Set up acceptance test environment • Create acceptance test scripts • Execute acceptance tests and log results • Update system based on acceptance test results • Re-execute acceptance tests and logs results • Obtain sign-off of system for package implementation		FINALISE PACKAGE INTEGRATION • Develop requirements traceability matrix • Baseline project deliverables • Develop schedule for next stage • Review project status with project board	
IMPLEMENT BUSINESS CHANGE	EDUCATION DEVELOPMENT • Set up training environment • Create application user guide • Create administrators guide • Develop training materials		PACKAGE DEPLOYMENT PREPARATION • Develop background scheduling processes • Create production test scripts • Review and compile technical implementation plan • Establish technical environment • Implement change management plan • Implement communications plan • Conduct deployment briefings • Conduct training • Complete process review			INSTALLATION AND HANDOVER • Install application software • Convert static and acquire new data • Convert dynamic data • Perform production tests • Cut over to new application • Create maintenance guide • Sponsor and business sign-off • Review project closure with project board			
DELIVER BUSINESS BENEFITS	BENEFITS MANAGEMENT • Delivering business benefits is the ultimate goal of a IT enabled business change project. • Using benefits management, benefits need to be clearly identified at the beginning of the project with supporting metrics • It may time after a change project for the benefits to become visible and measurable		POST IMPLEMENTATION REVIEWS At some time after the implementation, one or more Post Implementation Reviews (PIRs) should be planned to review if the planned benefits have been realised		KEY PERFORMANCE INDICATORS As part of the development of Benefits Management plan there will be Key Performance Indicators (KPI's) that would have been identified to ensure the potential business benefits could be measured and reported		PROJECT MANAGEMENT ACTIONS • Perform lessons learned meeting • Schedule PIR on benefits delivery • Implement continuous improvement process • Plan and schedule ongoing benefits assessment		