***<PROJECT NAME>***

**IMPLEMENTATION PLAN**

Version *<1.0>*

*<mm/dd/yyyy>*

**VERSION HISTORY**

[Provide information on how the development and distribution of the Project Implementation Plan was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Version #** | **Implemented**  **By** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Reason** |
| 1.0 | *<Author name>* | *<mm/dd/yy>* | *<name>* | *<mm/dd/yy>* | *<reason>* |
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***Notes to the Author***

[This document is a template of a **Project Implementation Plan** document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

* Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

**When using this template, the following steps are recommended:**

1. Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field document values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected) select File->Properties->Summary and fill in the appropriate fields within the Summary and Custom tabs.

After clicking OK to close the dialog box, update all fields throughout the document selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update each field individually by clicking on it and pressing F9.

These actions must be done separately for any fields contained with the document’s Header and Footer.

1. Modify boilerplate text as appropriate for the specific project.
2. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.
3. To update the Table of Contents, right-click on it and select “Update field” and choose the option - “Update entire table”.
4. Before submission of the first draft of this document, delete this instruction section “Notes to the Author” and all instructions to the author throughout the entire document.

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# Introduction

## 1.1 Purpose

*[This subsection of the Project Implementation Plan describes the purpose of the plan and identifies the system to be implemented.]*

## ****1.2 System Overview****

*[This subsection of the Project Implementation Plan provides a description of the system to be implemented and its organization.]*

### **1.2.1 System Description**

*[This subsection of the Project Implementation Plan provides an overview of the processes the system is intended to support. If the system is a database, provide a description of the type of data maintained, sources and uses of that data. Include any identification numbers, titles, abbreviations, version numbers and release numbers to describe the system. ]*

### 1.2.2 Assumptions and Constraints

*[This subsection of the Project Implementation Plan describes the assumptions made regarding the development and execution of this document as well as the applicable constraints. Some items to consider when identifying the assumptions and constraints are:*

* *Schedule*
* *Budget*
* *Resource availability and skill sets,*
* *Software and other technology to be reused or purchased,*
* *Constraints associated with product interfaces ]*

### **1.2.3 System Organization**

[This subsection of the Project Implementation Plan provides a description of the system structure and the major system components essential to its implementation. It should describe both hardware and software, as appropriate. Charts, diagrams, and graphics may be included as necessary to provide a clear picture of the system.]

## ****1.3 Glossary****

*[This subsection of the Project Implementation Plan lists all terms and abbreviations used in this plan. If it is several pages in length, it may be placed in an appendix.]*

# ****2 Management Overview****

*[This section of the Project Implementation Plan provides a description of how the implementation will be managed and identifies the major tasks involved.]*

## ****2.1 Description of Implementation****

*[This subsection of the Project Implementation Plan provides a description of the planned deployment, installation, and implementation approach. Include whether the system will be implemented using a phased approach or an “instant-on” approach. ]*

## ****2.2 Points-of-Contact****

*[This subsection of the Project Implementation Plan identifies the System Proponent, the name of the responsible organization(s), titles, and telephone numbers of the staff who serve as points of contact for the system implementation. These points-of-contact should include the Business Sponsor, Program Manager, Project Manager, Quality Assurance Manager, Configuration Management Manager, Security Officer, Database Administrator, or other managers and representatives with responsibilities relating to the system implementation. The site implementation representative for each field installation or implementation site should also be included, if appropriate.]*

Add additional lines as needed to the table. If the applicable team members are listed in the Project Management Plan, reference the appropriate section within that document.]

|  |  |  |
| --- | --- | --- |
| Role | **Name** | **Contact Number** |
| Business Sponsor |  |  |
| Project/Program Manager |  |  |
| Government Project Officer |  |  |
| System Developer or System Maintainer |  |  |
| Quality Assurance Manager |  |  |
| Configuration Management Manager |  |  |
| Security Officer |  |  |
| Database Administrator |  |  |
| Site Implementation Representative |  |  |
| IV&V Representative |  |  |

**Table 2.2 – Points-of-Contact**

## ****2.3 Major Tasks****

[This subsection of the Project Implementation Plan provides descriptions of the major system implementation tasks. Add as many subsections as necessary to this subsection to describe all the major tasks. The tasks described in this subsection are not site-specific, but generic or overall project tasks that are required to install hardware, software, and databases, prepare data, and validate the system

If several implementation approaches are being reviewed, then identify the advantages, disadvantages, risks, issues, estimated time frames, and estimated resource requirements for each option considered. These options could include:

* *Incremental implementation or phased approach*
* *Parallel execution*
* *One-time conversion and switchover*
* *Any combinations of the above.*

*Include the following information for the description of each major task, if appropriate:*

* *What the task will accomplish*
* *Resources required to accomplish the task*
* *Key person(s) responsible for the task*
* *Criteria for successful completion of the task (e.g., “user acceptance”)*

*Examples of major tasks are the following:*

* *Provide overall planning and coordination for the implementation*
* *Provide appropriate training for personnel*
* *Ensure that all manuals applicable to the implementation effort are available when needed*
* *Provide all needed technical assistance*
* *Schedule any special computer processing required for the implementation*
* *Perform site surveys before implementation*
* *Ensure that all prerequisites have been fulfilled before the implementation date*
* *Provide personnel for the implementation team*
* *Acquire special hardware or software*
* *Perform data conversion before loading data into the system*
* *Prepare site facilities for implementation*

Consider addressing the changes that may be necessary once the system has been implemented. These changes may include, but are not limited to, personnel and technology equipment alignment, and contractor support.]

## ****2.4 Roll-Out Schedule****

[This subsection of the Project Implementation Plan provides a schedule of activities to be accomplished. Show the required tasks (described in Subsection 2.3, Major Tasks) in chronological order, with the beginning and end dates of each task. If MS Project is used to plan the implementation, include the project Gantt chart. Include any milestones from the projects that are dependent on this project and vice-versa.]

## ****2.5 Security and Privacy****

*[This subsection of the Project Implementation Plan includes an overview of the system security and requirements that must be followed during implementation. If the system contains personal data, describe how Privacy Act concerns will be addressed.]*

### **2.5.1 System Security Features**

*[This subsection of the Project Implementation Plan provides an overview and discussion of the security features that must be addressed when it is implemented. It should include the determination of system sensitivity and the actions necessary to ensure that the system meets all the criteria appropriate to its Certification level. Reference the applicable security guidance documents.]*

### **2.5.2 Security Set Up During Implementation**

*[This subsection of the Project Implementation Plan addresses security issues specifically related to the implementation effort, if any. For example, if LAN servers or workstations will be installed at a site with sensitive data preloaded on non-removable hard disk drives, address how security would be provided for the data on these devices during shipping, transport, and installation because theft of the devices could compromise the sensitive data.]*

# ****3 Implementation Support****

[This section of the Project Implementation Plan describes the support hardware, software, facilities, and materials required for the implementation, as well as the documentation, necessary personnel and training requirements, outstanding issues and implementation impacts to the current environment. The information provided in this section is not site-specific. If there are additional support requirements not covered by the subsequent sections, others may be added as needed.]

## ****3.1 Hardware, Software, Facilities, and Materials****

*[This subsection of the Project Implementation Plan lists all support hardware, software, facilities, and materials required for the implementation.]*

### **3.1.1 Hardware**

[This subsection of the Project Implementation Plan provides a list of support equipment and includes all hardware used for installing and testing. This hardware may include computers, servers, peripheral equipment, simulators, emulators, diagnostic equipment, other non-computer equipment as well as any network and data communication requirements. The description should include the specific models, versions, configuration settings, and the equipment owner. Also include information about manufacturer support, licensing, and usage and ownership rights, and maintenance agreement details.

If this information is recorded in another document or system, such as the Configuration Management Plan or tool, identify that item here. Otherwise, refer to the Hardware Inventory table in Appendix D.

*For example, if a web-enabled database is to be implemented, identify the application and web servers that will provide network access. If the hardware is site-specific, list it in Section 4, Implementation Requirements by Site.]*

### **3.1.2 Software**

*[This subsection of the Project Implementation Plan provides a list of non-hardware components (software, databases, and compilers, operating systems, utilities, etc.) required to support the implementation. Identify the component by specific name, code, or acronym, identification numbers, version numbers, release numbers, and applicable configuration settings. Also, include information about vendor support, licensing, usage, and ownership rights, as well as any required service and/or maintenance contract costs and associated payment responsibility. Identify whether the component is commercial off-the-shelf, custom developed or legacy. Identify any component used to facilitate the implementation process.*

*If this information is recorded in another document or system, such as the Configuration Management Plan or tool, identify that item here. Otherwise, refer to the Software Inventory table in Appendix E.*

*If the component is site-specific, list it in Section 4, Implementation Requirements by Site.]*

### **3.1.3 Facilities**

*[This subsection of the Project Implementation Plan identifies the physical facilities, accommodations and their location(s) required during implementation. Examples include physical workspace for assembling and testing hardware components, desk space for software installers, floor space for equipment, and classroom space for training the implementation staff. Specify the hours per day needed, number of days, and anticipated dates.*

*If the facilities needed are site-specific, provide this information in Section 4, Implementation Requirements by Site.]*

### **3.1.4 Materials**

*[This subsection of the Project Implementation Plan identifies any other consumables (i.e. technology, supplies, and materials) required to support the system. Provide the names, identification numbers, version numbers, release numbers, owners, and any associated maintenance or operational costs.*

*If the materials needed are site-specific, provide this information in Section 4, Implementation Requirements by Site.]*

## **3.2 Documentation**

*[This subsection of the Project Implementation Plan lists any additional documentation needed to support the deliverable system. Include any security or privacy protection considerations associated with the systems use. If created, make reference to the Software User Documentation Guide for user documentation.]*

## ****3.3 Personnel****

*[This subsection of the Project Implementation Plan describes committed and proposed staffing requirements. Describe the training, if any, to be provided for the implementation staff.]*

### **3.3.1 Staffing Requirements**

*[This subsection of the Project Implementation Plan describes the number of personnel, length of time needed, types of skills, skill levels, expertise, and any necessary security clearances for the staff required during the implementation period. If particular staff members have been selected or proposed for the implementation, identify their roles and responsibilities.]*

### **3.3.2 Training of Implementation Staff**

*[This subsection of the Project Implementation Plan addresses the training, if any, necessary to prepare staff for implementing the system; it does not address user training, which is the subject of the Software Training Plan.*

*Describe the type and amount of training required for each of the following areas, if appropriate, for the system:*

* *System hardware/software installation*
* *System support*
* *System maintenance and modification*

*List the courses that will be provided, a course sequence, and a proposed schedule. If appropriate, identify which courses particular types of staff should attend by job position description.*

*If one or more commercial vendors will provide training, identify them, the course name(s), and a description of the course content.*

*If Center staff will provide the training, provide the course name(s) and an outline of the content of each course. Identify the resources, support materials, and proposed instructors required to teach the course(s).]*

## **3.4 Outstanding Issues**

[This subsection of the Project Implementation Plan states any known issues or problems relevant to implementation planning. This section answers the question, “Are there any specific issues, restrictions, or limitations that must be considered as a part of the deployment?”]

## ****3.5****Implementation Impact

*[This subsection of the Project Implementation Plan describes how the system’s implementation is expected to impact the network infrastructure, support staff, user community, etc. Include any references to Service Level Agreements which describe the performance requirements, availability, security requirements, expected response times, system backups, expected transaction rates, initial storage requirements with expected growth rate, as well as help desk support requirements]*

## ****3.6 Performance Monitoring****

*[This subsection of the Project Implementation Plan describes the performance monitoring tool, techniques and how it will be used to help determine if the implementation is successful.]*

## ****3.7 Configuration Management Interface****

*[This subsection of the Project Implementation Plan describes Configuration Management, such as when versions will be distributed. Reference the Configuration Management Plan.]*

## 4.0 Change Management

*[This subsection of the Project Implementation Plan describes Change Management, which is a workstream focused on ensuring that the new system is accepted by the user community and incorporated into day-to-day activities performed by users]*

*[Discuss change management activities here]*

## 4.1 User Training

*[This subsection of the Project Implementation Plan describes training sessions (e.g., what the training entails, who will attend the training, and when the training will be performed) to be performed as part of the implementation of the system.]*

## 4.2 Communication Plan

*[This subsection of the Project Implementation Plan describes Communications to announce the implementation of the system to stakeholders and to provide ongoing status updates and announcements to the user community.]*

*[Introduce communications here.]*

The tables in the following sections provide an overview of the communications for each phase of the project. Each table provides details on communication objectives and key messages at a summary level. Additionally, the tables provide detailed information on specific communications to be made during each phase including the audience, delivery mechanism, message detail, and expected due date/frequency of the message.

|  |  |  |  |
| --- | --- | --- | --- |
| **Communication Objectives** | |  | |
| **Key Messages** | |  | |
| **Audience** | **Delivery Mechanism** | **Message Detail** | **Expected Due Date/Frequency** |
|  |  |  |  |

## 4.3 Acceptance Criteria

*[This subsection of the Project Implementation Plan establishes the* ***exit or acceptance criteria*** *for transitioning the system into production. Identify the criteria that will be used to determine the acceptability of the deliverables as well as any required technical processes, methods, tools, and/ or performance benchmarks required for product acceptance. ]*

APPENDIX A: Project Implementation Plan Approval

The undersigned acknowledge that they have reviewed the ***<Project Name>* Implementation Plan** and agree with the information presented within this document. Changes to this **Project Implementation Plan** will be coordinated with, and approved by, the undersigned, or their designated representatives.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
|  |  |  |  |
| Title: |  |  |  |
| Role: | Project Manager |  |  |

APPENDIX B: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| *<Document Name and Version Number>* | *<Document description>* | *<URL or location where document is located>* |
|  |  |  |
|  |  |  |

APPENDIX C: KEY TERMS

The following table provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| *[Insert Term]* | *<Provide definition of term and acronyms used in this document.>* |
|  |  |
|  |  |

APPENDIX D: System Hardware Inventory

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name/ ID | Type | Model/ Version | Physical Location | Equipment Owner  (Person or Dept) | Maintenance Contract? Y/N | Maintenance Contact Point | Maintenance Type/ Level of Coverage | Maintenance Period Expiration Date | Required Licenses |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

APPENDIX E: System Software Inventory

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name/ ID | Type | Model/ Version | Physical Location | Equipment Owner  (Person or Dept) | Maintenance Contract? Y/N | Maintenance Contact Point | Maintenance Type/ Level of Coverage | Maintenance Period Expiration Date | Required Licenses |
|  |  |  |  |  |  |  |  |  |  |
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