# TRANSITION PLANNING AND SUPPORT PROCESS

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Change history

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1. **Purpose, scope and users**

The aim of this document is to define the purpose, scope, principles and activities of the Transition Planning and Support process.

This document is applied to the entire [IT Service Management (ITSM)] organization.

Users of this document are all employees of [organization name], as well as all external parties who have a role in ITSM.

2. **Reference documents**

- Design Coordination Process
- Change Management Process
- Service Asset and Configuration Management
- Continual Service Improvement Process
- Service Level Management Process

3. **Policy**

[organization name] uses the Transition Planning and Support process to plan and organize service transition from the design stage into the operational stage (referred to as "service transition") and to coordinate required resources.

The objectives of the Transition Planning and Support process are:

- Plan and organize resources needed to successfully transition services into the live environment by fulfilling service design requirements
- Coordinate activities of all resources and projects
- Plan transition stage, test and build:
  - New or changed services
  - Management information systems and tools
  - Processes
  - Measurement systems, metrics and methods
  - Architecture
- Identify, manage and control risks throughout service transition activities
- Monitor and improve service transition
4. Process activities

4.1. Transition strategy
Transition strategy defines [organization name]'s overall approach to organize and allocate resources for transition activities of a particular service (a Transition Plan is created separately for each service). [role description] is responsible to produce the transition strategy in the form of a Transition Plan (see Appendix).

4.2. Service transition lifecycle stages
[role description] is responsible to take over the Service Design Package (see Service Design Package in Appendix of Design Coordination Process) deliverables (i.e. quality check criteria) of all transition stages.

4.3. Prepare for service transition
[role description] ensures that:
- [role description] performed a Service Design Package (SDP) review and communicates results to [Design Coordination Manager]
- All resources needed to transition the service from design into the live environment are provided to ensure a smooth transition
- Baselines are recorded by [role description] and stored in [location of baseline storage area]

4.4. Planning and coordinating service transition

4.5. Provide transition process support
The following activities are performed within the scope of support activities:
- Advice – [Transition Manager] provides support on an organizational and operational level to all parties involved in service transition for all issues regarding process and customer release and deployment policy (see Customer Release and Deployment Policy in Appendix of Release and Deployment Process).
- Administration – [Transition Practitioner] fulfills the following administrative activities:
  - Managing all issues connected to transition activities and processes
  - Managing transition performance and providing input into Continual Service Improvement process
- Communication – [Transition Practitioner] is responsible to establish and maintain communication channels between parties involved in transition activities
- Progress monitoring and reporting – [Transition Practitioner] monitors activities and in the customer policy for

Comment [BV7]: Or some other role Management process.

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5. Roles and responsibilities

5.1. Transition Manager

[Job title] assigns the Transition Manager role.

Responsibilities of Transition Manager:

- General responsibility for carrying out activities within the scope of the Transition Planning and Support Management process
- Following the completion of the transition activities – reports to interested parties on the outcomes achieved against the expected outcomes
- Coordinates with other Service Management roles
- Responsible for reporting and managing information
- Manage work of Transition Planning and Support Management staff
- Ensures that budgeting and accounting for transition activities are defined and in place, implemented and used by [Financial Manager]
- Serves as a central point for all activities during service transitions
- Compares Service Design Package (SDP) and actual results of transition activities, and ensures that SDP meets customer requirements

5.2. Transition practitioner

Responsibilities of the Transition practitioner include:

- Maintains and integrates plans for service transition
- Monitors transition activities of new or changed services and risk mitigation activities
- Communicates with stakeholders
- Prepares management information data on resource and budget usage as well as service transition progress

6. Measurement and metrics

6.1. Measurement

[Role description] is responsible to

[Role description] is responsible to:

- Evaluate reports
- Define measures for improvement
- Send reports to Service Level Manager on a monthly basis
6.2. Metrics

Metrics reports are produced monthly, with quarterly and yearly summaries. Metrics to be reported:

- Total number of instances for which TPRP is required
- Total number of services which were handed over to operational processes (to Service Level Management process)
- Breakdown of events by categories

7. Critical Success Factors (CSF) and Key Performance Indicators (KPI)

[role description] is responsible to define CSFs and respective KPIs. Achievements against KPIs are monitored and evaluated by [role description].

<table>
<thead>
<tr>
<th>Critical Success Factor</th>
<th>Key Performance Indicator</th>
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<tbody>
<tr>
<td>Identify and manage risk in service transition</td>
<td>Number of unsuccessful transitions</td>
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<tr>
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<td>Number of times transition was post-implemented successfully</td>
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8. Managing records kept on the basis of this document

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<th>Record name</th>
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<td>Reports</td>
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9. Validity and document management

This document is valid as of [date].

Owner of this document is [job title], who must check and, if necessary, update the document at least once a year.

10. Appendices

- Appendix 1: Transition Plan template