

Transition & *Rollout Plan*

Plans how the new product or process moves into live use and into the hands of the people who will run it: cutover, data, handover, support, and the decision to go or hold.

USE WHEN	OWNER	APPROACH	TIER
Any release that changes live operations or hands work to another team.	Project manager drafts · receiving owner agrees · sponsor approves	ALL	Standard

HOW TO USE THIS TEMPLATE

1. Agree the receiving owner and transition approach first (sections 1 and 2).
2. Build the cutover steps backward from go-live, with a rollback point for each risky step.
3. Rehearse the cutover and the rollback before the go/no-go decision.
4. Check readiness with the transition readiness checklist (T76) before section 9.
5. Delete guidance text (*italic*) before sharing.

Project ·
project ID

Release or
deliverable

Prepared by

Version · date

Approved by ·
date

Terms. **Transition** is handing a finished deliverable to the people who will own and run it. **Cutover** is the planned switch from the old way to the new one. A **rollback point** is the last moment you can return to the old way cleanly. **Hypercare** is a short period of extra support right after go-live (common practice). The people side of adoption is in the organizational change and adoption plan (T51); emergency fixes after go-live follow the change management plan (T48).

1 Receiving organization and owner

Name who owns the deliverable after the project ends, both the technical side and the business side. The receiving owner should agree this plan, not just receive it. Test: there is one name per row, and that person has said yes.

Receiving owner (runs and supports it)	
Business owner (process and results)	
Support team and size	
Formal handover date and how it is accepted	
What transfers (systems, documents, contracts, budget)	

2 Transition approach

Choose how the change goes live. Most teams choose by risk, volume, and how easily they can go back. Say why in two sentences. Test: the reason names a risk the approach reduces.

APPROACH	HOW IT WORKS	USE WHEN	WATCH FOR
Big bang	Everyone switches at one cutover	Small or tightly linked user base; old and new can't run together	No fallback once live; needs a strong rollback point
Phased	Groups, sites, or features go live in waves	Large or varied user base; lessons from wave 1 help wave 2	Longer transition; two ways of working at once
Parallel	Old and new run side by side for a period	Errors are costly; results must be compared	Double work for staff; needs a firm end date

☐ Big bang
 ☐ Phased
 ☐ Parallel
 ☐ Mixed (describe below)

Why this approach	
Waves or parallel period (dates)	
Work in progress on the old way (how it finishes)	

3 Cutover plan

List each cutover step in order with an owner, a start time, and a duration. Mark the rollback point before any step that is hard to undo. Give times in one time zone and say which. Test: someone not on the project could run the cutover from this table.

[illegible]

Time zone used · vendor time zone

Cutover rehearsal (date, result)

Cutover timeline

Optional. Put dates or days across the top and mark each activity's days with an X; use it to spot clashes with holidays, training, and peak work.

[illegible]

4 Data migration

Say what data moves, from where to where, how it is cleaned, and how you prove it arrived complete and correct. Include who signs off personal or client data. Test: the validation can fail; a check that always passes isn't a check.

Data in scope (records, volume)	
Source and target	
Cleansing before the move (owner, by)	
Data out of scope (and where it stays)	
Validation (counts, spot checks, pass mark)	
Privacy and data sign-off	
Rehearsal (date, result)	

5 Training and documentation handover

List what the receiving team needs to run the deliverable without the project team: guides, access, walkthroughs, and open issues. Name the evidence that the handover worked. Test: the receiving team could fix a common problem alone.

ITEM	FROM	TO	DATE	EVIDENCE OF HANDOVER

6 Support model and escalation

Set who handles what after go-live, how fast, and where it escalates. Take escalation timings from the governance model (T12). Test: a user with a problem knows exactly who to contact first.

TIER	WHO	HANDLES	RESPONSE TARGET	HOURS
How users report a problem				
Escalation path and timings (T12)				
Urgent issues (data exposure, outage): who, how fast				

7 Hypercare period and exit criteria

Hypercare (common practice) is extra support right after go-live: faster triage, the project team and vendor on hand. Set its length and the measurable conditions for ending it. Test: exit is decided by the criteria, not the calendar alone.

Hypercare period (start, end)	
Daily triage (time, who attends)	
Who decides exit, and when	

EXIT CRITERION	MEASURE OR EVIDENCE	MET?

8 Rollback plan

Decide in advance what would make you go back, who decides, and the steps to restore the old way. Rehearse it. After the last rollback point, you fix forward. Test: the rollback can be finished before users are affected.

Rollback triggers	
Who decides, how fast	
Rollback steps (in order)	
Last rollback point	
Who tells users and how	
After the last point (fix forward via T48)	

9 Go/no-go criteria

List the conditions that must be true to go live, with the evidence for each. Agree them before the decision meeting, not in it. A condition that isn't met means hold, or go with a condition the sponsor accepts in writing. Test: each criterion is a yes or no.

[illegible]

10 Approval and revision history

The receiving owner agrees the plan and the sponsor approves it. Update after the rehearsal and record each version.

Prepared by (PM) · date	Receiving owner · date	Approved by (sponsor) · date
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Version	Date	Author	Summary of Change	Approved By

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

Plan v1.1, May 26, 2027 (v1.0 approved by Dana Whitfield April 22; v1.1 adds rollback timing after the May 25 rehearsal). Prepared by Amy Price; agreed by Priya Shah. Times Central (Clearpath on Pacific).

1 · Receiving organization

Receiving owner: Priya Shah, IT Manager, with two IT support analysts. **Business owner:** Marcus Reyes. **Handover:** June 25 with final acceptance (T75). **Transfers:** portal admin console, CRM sync, admin guide (CI-08), Clearpath support contact.

2 · Approach

Big bang for new clients from June 1. Six coordinators and one client flow make waves pointless, and a strong rollback point covers the risk. Clients already mid-onboarding finish on email by June 30.

3 · Cutover plan

#	STEP	OWNER	DATE AND TIME	DUR.	DEP.	ROLLBACK POINT
C1	Go/no-go decision (section 9)	Dana Whitfield	Thu May 27, 2:00 pm	1 h		
C2	Stop new-client intake on old forms	Marcus Reyes	Fri May 28, 8:00 am	15 m	C1	
C3	Final client data export; CRM snapshot	Priya Shah	Fri May 28, 9:00 am	2 h	C2	RB1 before load
C4	Migration load (TR-01, TC-22)	Clearpath with Priya	Fri May 28, 11:00 am	4 h	C3	
C5	Migration validation	Elena Torres, champions	Fri May 28, 3:00 pm	2 h	C4	
C6	Switch on CRM sync (TC-07)	Clearpath	Fri May 28, 5:00 pm	1 h	C5	RB2 sync off
C7	Smoke test; build matches UAT build (T49)	Priya Shah	Sat May 29, 9:00 am	3 h	C6	
C8	Go-live confirmed to sponsor	Amy Price	Sat May 29, 1:00 pm	15 m	C7	Last point
C9	Portal opens; welcome emails to new clients	Marcus Reyes	Tue Jun 1, 8:00 am	Day	C8	Fix forward

Cutover timeline · May 24 to June 2

ACTIVITY	M 24	T 25	W 26	TH 27	F 28	SA 29	SU 30	M 31	T 1	W 2
Configuration audit; release freeze	Gold	Gold	Gold	Gold						
Migration and rollback rehearsal		Gold								
Coordinator training		Gold	Gold							
Go/no-go decision				GO						
Cutover C2 to C6					Navy					
Smoke test; go-live confirmed						Navy				
Memorial Day (no work)								Hol		
Go-live; hypercare to Jun 25									Navy	Navy

Gold = preparation · navy = cutover and go-live. Priya's knowledge-transfer prep moved to the week of June 7 to free this week (T34).

4 · Data migration

412 active client records from the CRM and onboarding spreadsheet, limited to the approved field list (CI-06 v1.1, Elena Torres). Duplicates cleaned by May 21 (cause of I-01). In-flight onboardings stay on email. **Pass mark:** counts match 100%, 25-record spot check by the champions, no field outside CI-06. Rehearsed May 25 on staging: passed.

6 · Support model

Tier 1 coordinators, client how-to, same business day. **Tier 2** IT support analysts: access, sync, defects; P1 in 1 hour, P2 in 4 working hours, P3 in 2 working days. **Tier 3** Clearpath, configuration defects through June 25. Work tracked on the portal support board from June 1 (T82). Escalation per T12; suspected data exposure to Elena and Dana the same day.

7 · Hypercare

June 1 to 25. Triage daily at 10:00 for two weeks (Amy, Priya, Marcus, Clearpath delivery lead), then Monday, Wednesday, Friday. Dana decides exit June 25 with final acceptance. **Exit criteria:** no open P1 or P2 · IT support closes 3 tickets without Clearpath by June 23 · admin guide accepted · tickets falling two weeks running · on track for 50% online by June 30.

8 · Rollback

Triggers: record counts off by more than 1%, a field outside CI-06, a P1 not fixed by Saturday noon, or suspected data exposure. Dana decides within an hour, advised by Priya and Elena. Steps: block client access, sync off, restore CRM from RB1, keep email intake, Marcus tells notified clients. Restore took 40 minutes in rehearsal. After 1:00 pm Saturday, fix forward (T48 s6).

9 · Go/no-go · Thursday, May 27, 2:00 pm · decider Dana Whitfield

CRITERION	EVIDENCE	MET?
UAT complete, first-run pass rate 95% or higher	UAT report May 21	Yes
No Priority 1 defect open (T12)	Defect list May 27	Yes
Security fixes verified	Retest April 23	Yes
Production build is the UAT-tested build	Configuration audit May 24–27 (T49)	Yes
Migration and rollback rehearsed	Rehearsal May 25	Yes
Release 1 accepted	Partial acceptance May 24; P3 list agreed by Marcus	Yes, with condition
Coordinators trained; client notice sent	Training May 25–26; notice May 18	Yes
Support rota confirmed, including Saturday May 29	Rota in T41	Yes

Decision: Go, 2:10 pm, on condition the P3 list is fixed in hypercare. Recorded as a decision in T55.