

 **Protective Marking**

Transition and Support Plan

Project/Program name

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This template includes prompts and example text to support the development of the Transition and Support Plan. Delete the prompts and example text before finalising the document.

# About this template

This template includes an optional Roadmap (at the end of the template). Feel free to only complete this Roadmap or, work through the detail of this document, or both.

A change management transition and support plan is a document that lays out the tasks and activities to be performed to efficiently transition the change to an operational state. While the Training plan focuses on knowledge transfer prior to delivery, a Transition and Support Plan focuses on the support given at the point of change (pre go live, go live day and post go live support). This can involve a number of activities across multiple streams (e.g. communication, business readiness, support, business contingency etc.) within a condensed time period. The plan ensures the seamless and continuous operation of a business unit as it moves from the current to the new state, minimising disruption to service. It puts in place a clear and agreed process to efficiently manage issues and risks and supports the embedding of the change into operation. Developing this plan can start as soon as you start engaging stakeholders, analysing the change and planning the change management.

For change management guidance and support, please contact the APS Change Management Centre of Excellence at PortfolioChangeStewardshipOffice@homeaffairs.gov.au

If the Version Control and Endorsement section is not required for this change, this section can be deleted.

**Version control and endorsement**

**Version control**

Before use, please verify this document is current.

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| **Version number** | **###** |
| Version date |  |
| Document status |  |
| File name |  |
| Author |  |
| Record management reference |  |

**Reviews and approvals**

This document has been reviewed and approved by the people in this list. Evidence of the approvals is retained in *Record Management* system.

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# Introduction

Provide a short description of the document purpose or use standard text below.

The Transition and Support Plan describes the approach and the transition and support requirements at the point of the change. It also identifies the activities necessary to ensure a smooth transition to the future state. The purpose of this document is to provide detailed information on the transition and support activities to enable relevant business areas to plan transition and support delivery.

The Transition and Support Plan is a chapter of the Change Playbook. Each Change Playbook chapter builds on from the previous one/s. Not all chapters are completed for every change initiative. The change manager decides on the appropriate documentation to support the change management.

Please refer to the first chapter, the Change Context for the list of the playbook chapters, which include further information on the change management of this project/program.

|  |  |
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| Chapter title | Record management reference |
| Change Context  | Record Management reference |

# Objectives

This section provides a high level summary of the project/program transition and support objectives.

Transition and support objectives can be varied and are largely dependent on:

* Size and scale of the change
* Nature of the change and impact on the staff and organisation
* Support demand of the change

### Considerations

* The level of support required for each phase (before implementation, on the day and post implementation
* What you want stakeholders to be able to do
* What level of knowledge is required to support the change
* BAU (Business-As-Usual) resources that will be responsible for managing change activities to sustain the change.
* The activities required for handover and the success criteria

# Assumptions and expectations

The execution of this training plan assumes the following:

List assumptions and expectations – for example, that staff have base operational knowledge and experience.

### Considerations

* Limiting factors that could affect project/program performance such as resources
* Dependencies such as activities that should occur before (predecessor) or after (successor) activities in the transition schedule

# Transition approach

Provide a summary view of the transition and support approach.

This section provides the approach to support the deployment of the change.

### Considerations

* Roll out strategy – How is the product going to be delivered? Phased or big bang? For example data migration, testing
* Implementation – Outline of the steps /schedule
* Resources – Transition team members and responsibilities
* Logistics – maintenance and support requirements related to systems and processes
* Transfer of knowledge – new skills or equipment and associated training
* Change and communication and activities alignment at the point of change

### Focusing questions

* What are the information and support needs of staff, clients and stakeholders before transition, on the day and post transition?
* Are there any stakeholders with special/unique support needs?
* How will information be communicated before transition, on the day and post transition? Where will managers and staff access information?
* How long does the support need to be in place post transition?
* How will the support arrangements be staffed? Who are the resolution groups who may need to be drawn on?
* What skills do support staff require? What is required to prepare these groups for delivering support?
* What are the operational or process considerations?
* How will issues be managed?
* What ongoing activities, engagement and communication are needed to ensure the change is sustained?
* Will there be additional training needed or areas where help is needed?
* What is the criteria for a successful transition?
* How will progress be monitored?

# Risks

The identified risks and mitigation strategy for each are outlined in the table below. A risk is an uncertain event or set of events that, should it occur, will have an effect on the achievement of objectives.

|  |  |
| --- | --- |
| RISK | MITIGATION STRATEGY |
| E.g. Limited staff availability for training. | E.g. Early negotiation of training timeframes with management teams. Propose access to self-service materials which staff may access for flexibly.  |
|  |  |
|  |  |
|  |  |

# Issues

The identified issues and mitigation strategy for each are outlined in the table below. An issue is relevant event that has happened, was not planned and requires management action. It could be a problem, query, concern, change request or a risk that has occurred.

|  |  |
| --- | --- |
| **ISSUE** | **MITIGATION STRATEGY** |
|  |  |
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# Transition and support schedule

At the end of any change delivery, there has to be a transfer of responsibilities from the change management team to a designated group that will be determined by the project/program leads in consultation with business areas.

Provide a summary view of the transition and support requirements for all stakeholders.

The transition and support tasks, activities and responsibilities are listed in the tables below.

Note: the table captures activities for all stakeholders. In the event there are stakeholders with special/unique needs, add a column to identify the stakeholders.

### Pre-transition activities table

What will you do before the transition the people through this change? Consider engagement, communication, training activities for example that will be undertaken to manage this change.

| Activity/task | Objectives | Delivery method | Delivery timing | Delivery responsibility | Budget(If applicable) |
| --- | --- | --- | --- | --- | --- |
| Type of transition activity. Consider engagement activities, communication and training | Define the transition objective, key messages and general transition requirements for this stakeholder role | How will this activity be delivered? (Self-service, online materials, teleconsultation, issue management sessions) | When will transition support be delivered? | Who is responsible for the development of support product /artefacts? Who has delivery responsibility for the various elements of the support activity? | Note any costs associated with the development and or delivery and who is responsible for this |
|  |  |  |  |  |  |

### On-the-day activities table

What activities will you do on the day? What support will be available? Consider engagement, communication, support material and resources.

| Activity/task | Objectives | Delivery method | Delivery timing | Delivery responsibility | Budget(If applicable) |
| --- | --- | --- | --- | --- | --- |
| Type of transition activity. Consider engagement activities, communication and training | Define the transition objective, key messages and general transition requirements for this stakeholder role | How will this activity be delivered? (Self-service, online materials, teleconsultation, issue management sessions) | When will transition support be delivered? | Who is responsible for the development of support product /artefacts? Who has delivery responsibility for the various elements of the support activity? | Note any costs associated with the development and or delivery and who is responsible for this |
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**Post-transition activities table**

What activities will you do post-transition to support and sustain the change, and then transition from post-transition into business operations? Consider engagement, communication, additional training activities for example.

| Activity/task | Objectives | Delivery method | Delivery timing | Delivery responsibility | Budget(If applicable) |
| --- | --- | --- | --- | --- | --- |
| Type of transition activity. Consider engagement activities, communication and training | Define the transition objective, key messages and general transition requirements for this stakeholder role | How will this activity be delivered? (Self-service, online materials, teleconsultation, issue management sessions) | When will transition support be delivered? | Who is responsible for the development of support product /artefacts? Who has delivery responsibility for the various elements of the support activity? | Note any costs associated with the development and or delivery and who is responsible for this |
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# Development schedule

## This section describes the intended schedule for the development of transition and support materials.

## Please ensure that consideration is given and timing allocated to input and review of transition materials by relevant Subject Matter Experts.

## Development schedule, including example activities

| Development phase | Action | Activity description / requirement | Responsible | Activity start | Activity end |
| --- | --- | --- | --- | --- | --- |
| Planning | Assess transition and support needs |  |  |  |  |
| Planning | Develop transition and support Plan |  |  |  |  |
| Planning | Review Transition and Support Plan |  |  |  |  |
| Planning | Sign off Transition and Support Plan |  |  |  |  |
| Development | Develop <product name> |  |  |  |  |
| Development | Develop <product name> |  |  |  |  |
| Development | Finalise all transition and support materials |  |  |  |  |
| Development | Prepare resolver groups / those providing support for their role |  |  |  |  |
| Development | Communication regarding transition and support arrangements |  |  |  |  |
| Delivery | Publish/circulate all transition and support materials |  |  |  |  |
| Delivery | Admin & coordination activities |  |  |  |  |
| Delivery | Finalise local training delivery schedule |  |  |  |  |

# Transition and Support roadmap

Completing this Roadmap of the Transition and Support activities is optional. Feel free to only complete this Roadmap or, work through the detail of this document, or both.

The Roadmap is an easy to follow visual. Knowing what stage you are at and gaining a clear view of upcoming tasks is an invaluable tool to keeping your change on track, and it will give you confidence that things are progressing as planned. The Transition and Support Roadmap can also be a useful tool when discussing the change management with stakeholders.

Project/Program name

## Date last updated:

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Activities | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year | Month/ year |
| e.g. Planning |  |  |  |  |  |  |  |  |  |  |  |  |
| e.g. Development |  |  |  |  |  |  |  |  |  |  |  |  |
| e.g. Delivery |  |  |  |  |  |  |  |  |  |  |  |  |
| e.g. Pre-transition activities |  |  |  |  |  |  |  |  |  |  |  |  |
| e.g. On-the-day activities |  |  |  |  |  |  |  |  |  |  |  |  |
| e.g. Post-transition activities |  |  |  |  |  |  |  |  |  |  |  |  |