

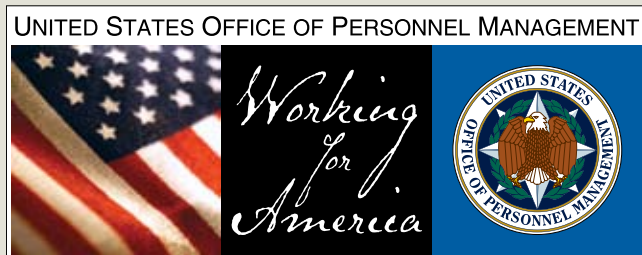


UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

MIGRATION PLANNING GUIDANCE TEMPLATES

CUSTOMER KICK-OFF MEETING PRESENTATION

May 23, 2008



[CUSTOMER AGENCY]

Kick-off Meeting

MM/DD/YY



AGENDA

- **Introduction and Background**
- **Introduce Migration Team**
- **Team Charter Review**
- **Roles and Responsibilities**
- **High Level Project Plan Review**
- **What Tasks are Planned for This Week?**
- **Project Templates**
- **Questions and Answers**

INTRODUCTION

- **Purpose**
- **Shared Service Center/Customer Agency Introductions**
 - **Name**
 - **Title**
 - **Background**
 - **Responsibilities**
 - **Where From**
- **Handouts (*suggested handouts*)**
 - **SSC Organization Chart Handout**
 - **SSC Contact List Handout**
 - **Team Charter**

SSC/CUSTOMER AGENCY MIGRATION CORE TEAM

TITLE

SSC

Customer Agency

Migration Manager

Team Leads

Change Mgmt

**List other team
leads here**

Shared Service Center Name



ROLES AND RESPONSIBILITIES

List by title role and responsibilities during the migration:

Role	Responsibility
Migration Manager	
Team Lead	
Team Member	



MIGRATION TEAM CHARTER

Objectives *(sample provided below)*:

- **Maintain migration budget and schedule**
- **Ensure all project objectives and metrics are met**
- **Ensure functional and technical specifications are met**
- **Maintain sound project management and change control**
- **Achieve knowledge transfer between SSC and Customer Agency team members**
- **Ensure user and other stakeholder involvement in and acceptance of the project**

HIGH LEVEL PROJECT PLAN REVIEW

ID	Task Name	Duration	Start	Finish	2, '06							Apr 9, '06				
					M	T	W	T	F	S	S	M	T	W		
1	Project Management	1 day?	Mon 4/3/06	Mon 4/3/06	█											
2	Develop migration project plan	1 day?	Mon 4/3/06	Mon 4/3/06	█											
3	Develop migration cost estimates	1 day?	Mon 4/3/06	Mon 4/3/06	█											
4	Negotiate SLAs	1 day?	Mon 4/3/06	Mon 4/3/06	█											
5	Preparation and Analysis	1 day?	Mon 4/3/06	Mon 4/3/06	█											
6	Define Communication Strategy and Plan	1 day?	Mon 4/3/06	Mon 4/3/06	█											
7	Plan testing environment	1 day?	Mon 4/3/06	Mon 4/3/06	█											
8	Design/Development	1 day?	Mon 4/3/06	Mon 4/3/06	█											
9	Develop Fit/Gap Analysis	1 day?	Mon 4/3/06	Mon 4/3/06	█											
10	Testing/Implementation	1 day?	Mon 4/3/06	Mon 4/3/06	█											
11	Begin migration	1 day?	Mon 4/3/06	Mon 4/3/06	█											
12	Post Implementation Evaluation	1 day?	Mon 4/3/06	Mon 4/3/06	█											
13	Develop lessons learned report	1 day?	Mon 4/3/06	Mon 4/3/06	█											

What Tasks Are We Going to Start This Week?

Examples listed below:

- **Risk Assessment Workshop**
- **Communication Plan**
- **Organization Change Readiness**
- **Assign Workload and Resources to Project Work Plan**

What Tasks Are We Going to Start This Week? - Risk Assessment Workshop

[SSC] to prepare workshop

- Identify possible risks
- Quantify risks
- Develop responses
- On-going identification and review

Participants

- SSC Team Leads
- Customer Agency Team Leads
- Facilitator

What Tasks Are We Going to Start This Week? - Communication Plan

[SSC] to prepare workshop

- Assemble communication requirements
- Develop communications strategy/plan

Participants

- SSC and Customer Agency Migration Managers
- Change Management SME
- Facilitator

PROJECT TEMPLATES

- **Project Plan**
- **Migration Cost Report**
- **Communication Plan**
- **Weekly Team Status Meeting**

PROJECT TOOLS - WEEKLY PROJECT STATUS MEETING

- **Schedule**
 - Every [WEEKDAY]
 - [4:00 PM TO 5:00 PM EASTERN STANDARD TIME]
- **Attendees: SSC and Customer Agency Core Team Leads**
- **Recurring Agenda Items**
 - Previous Week's Accomplishments
 - Next Week's Plans
 - Issues, Risks, Actions, Problems, etc
- **Use of Individual Written Status Reports**
- **First Meeting: MM/DD/YY**



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