**WHAT IS A SOFTWARE IMPLEMENTATION PLAN?**

A detailed description of how the vendor team will implement their software system within the client’s environment. This means a comprehensive plan that begins with the day the contract is signed and continues through “Go Live.” The implementation plan should provide a step-by-step and actionable sequence of events for executing the implementation along with the associated resources, decisions, and inputs the vendor requires from the client.

**WHEN SHOULD WE DO THIS?**

Establishing a detailed implementation is plan is critical BEFORE\* getting started. Ideally, the implementation plan is created by the vendor – then reviewed & approved by the client – BEFORE the initial contract is even signed between the parties. The implementation plan can be reviewed, iterated, and finalized BEFORE the project begins and should be attached directly in the contractual agreement.

\**Note*: this still applies in an Agile project! The client should require a full schedule, full plan, full risk assessment, and full details of both the vendor- and client-provided resources. Agile is not an excuse to avoid planning; rather, it is a methodology that anticipates flexibility, adjustment, and reprioritization during the implementation process. In Agile, it is **even more important** to set up a baseline plan to serve as a common reference point for all parties.

**WHY IS IT IMPORTANT?**

A comprehensive software implementation plan is critical for several reasons:

* Defining the baseline cost, schedule, and scope expectations – which should then be tracked during the project
* Simplifying the project control process – because current status can be related to the original baseline
* Improves executive reporting – easier to showcase the project’s current status & substantiate any changes
* Reducing surprises later – the vendor’s step-by-step actions are already known and expected.

**CHECKLIST**

The following checklist provides a list of planning elements to consider before starting a software implementation effort:

|  |  |  |
| --- | --- | --- |
| *Planning Element* | *Vendor**Completed?* | *Client Approved?* |
| SME’s provide technical due diligence & review all requirements with vendor |  |  |
| SME’s clarify technical details & concerns with vendor |  |  |
| Require vendor to conduct technical “deep dive” demonstrations |  |  |
| Clarify cost proposal with vendor |  |  |
| Clarify scope inclusions/exclusions with vendor |  |  |
| Clarify roles & responsibilities between client & vendor teams |  |  |
| Clarify execution methodology with vendor |  |  |
| Require vendor to submit implementation schedule with deliverables & client actions |  |  |
| Clarify any major concerns, risks, issues, suspicions, and/or problems with vendor |  |  |
| Require vendor to provide step-by-step actionable solutions for all major risks |  |  |
| Require vendor to define “trigger points” of when cost/schedule changes are valid |  |  |
| Require vendor to define potential impacts if non-controllable risks are encountered |  |  |
| Perform reference checks to verify accuracy and learn from peers |  |  |
| Review and clarify all mandatory requirements with vendor (security, training, funct.) |  |  |
| Require vendor to identify all client resources, decisions, & deliverables needed |  |  |
| Require vendor to list all unknowns at time of contract award (& when we will know) |  |  |
| Require the vendor to provide tangible examples, samples, & mock-ups as applicable |  |  |
| The vendor provided named resources for their implementation team |  |  |