

## SHARED SERVICES TEAM

**Document Name: Implementation and Cutover Plan**

### Usage Guidance

Toolkit materials should only be used with due consideration to the context and requirements of the programme in question. Materials should not be directly applied 'off the shelf.'

### CATEGORY DESCRIPTION

1. *Example material* – The tool has been provided by a single public or private sector organisation, or an external forum that has not been moderated by the Shared Services Team. It represents one possible approach to a given shared service activity, and can be used by Toolkit users as an example / reference aid.

2. *Co-developed material* – The tool has been produced through the collaboration of the Shared Services Team and one or more public sector organisations and / or private sector organisations. This tool Provides a jointly developed approach to a given shared services activity, and can be used by Toolkit users as an example / reference aid.

3. *Output Templates* – These set out what is typically included in an output of this name. They have been created as part of the development of the toolkit based on experience and best practice from other programmes and project methodologies. However, your organisation may already have a set format and template for you to use.

The following information is provided for convenience as part of the service we offer at this website. However, the Cabinet Office cannot accept any liability for its accuracy or content. Visitors who rely on this information do so at their own risk. If the material has been provided by a Private Sector organisation please refer to their Company website for further information.

Ref.	Week	Date	Overall Accountability	Responsible	Dimension1	Dimension2	Key Activities	Remarks	Status	Traffic Light
	week -08				Systems	System	Provide Master data overview for SSCR review			
	week -08				Process	Transition	Provide Services with list of their top 40 vendors			
	week -07				Systems	System	Prepare template for customer data load and provide to Transition			
	week -07				Process	Transition	Issue request to Services to bring expense claim submissions up-to-date prior to Go-Live			
	week -07				Process	Transition	Provide Services with template for customer data load and instructions to complete			
	week -07				Process	Transition	Issue request to Services to identify open queries (customer and vendor) and put actions in place to resolve pre Go-Live			
	week -07				Process	Transition	Request Services to chase backlog in unapproved Vendor invoices			
	week -06				Systems	Other	Provide access change authorisation process to SSCR for review			
	week -06				Process	Training	Specify IDS training requirement - AR team			
	week -06				Systems	ERP	Run download of vendor master data from System(EPOC specific suppliers?) and highlight any significant data gaps			
	week -06				Process	Transition	Collect data to fill any significant gaps in vendor master data			x
	week -06				Process	Transition	Review data quality re. Cluster 1 vendors and issue quality statement			x
	week -06				Systems	Other	Define and agree on branding for the Knowledge Base			
	week -06				Comms	Comms	Define and agree on branding for the Frontline (SSC Support) team			
	week -06				Systems	ERP	Issue standards re. use of Project Accounting module, formal structure etc.			
	week -06				Process	SSC	Contribute to SLA			
	week -06				Infrastructure	Infrastructure	Establish Service contacts for Office Project i.e. key contact required per location			
	week -06				Infrastructure	Infrastructure	Plan SSC Dry Run event			
	week -06				Systems	Other	Confirm practise solution Call logging/handling			
	week -06				Infrastructure	Infrastructure	Review SSC original floor plan vs. CQH layout and finalise layout			
	week -06				Infrastructure	Infrastructure	Establish details of arrangements with Cable and Wireless and advise Office Project if any implications for move			
	week -06				Process	Transition	Provide Solutions Delivery with SSC team roles (for Systemprofile setup)			
	week -06				Organisation	Service	Finalise retained Service organisation structure incl. agree approvers per OM structure			
	week -06				Process	Transition	Request a status statement regarding recoverable receivables for Cluster 1, specifying any actions required pre Go-Live			x
	week -06				Systems	Other	Define who in <b>SSC</b> needs access to Scorpion, Web Income, IBR, IDS, Carmen - at team level			
	week -06				Systems	Other	Define who in <b>retained Services</b> needs access to legacy systems or where access should be dis-enabled			
	week -06				Systems	Other	Specify technical requirements to enable legacy access			
	week -06				Systems	Other	Set-up technical requirements to enable legacy access			
	week -06				Process	Transition	Confirm and communicate Process Solutions Owners (Implementation)			
	week -06				Process	Transition	Review all current stationary - plan wind down and interim measures			x
	week -06				Comms	Comms	Order SSC stock of stationary e.g. headed paper etc.			
	week -06				Systems	ERP	Carry out end-to-end Sales to Collect UATs i.e. process and system			
	week -06				Comms	Comms	Identify list of 3rd parties (e.g. vendors, customers) requiring communication - Services stakeholders			
	week -06				Comms	Comms	Identify list of internal stakeholders requiring communication - Services stakeholders			
	week -06				Process	Transition	Provide SSCR with estimate sizing of purchasing scenarios			
	week -06				Comms	Comms	Identify list of SSC internal and external stakeholders requiring communication			
	week -06				Comms	Comms	Define communications strategy - SSC stakeholders			
	week -06				Recruitment/People	Recruitment/People	Weekly review of recruitment status and Go-Live resourcing position per team			

Green - completion on target/already complete  
 Amber - timing at risk but not a showstopper/  
 mitigating action in place  
 Red - a showstopper, intervention by Project  
 Management team required

D - done  
 P - In progress  
 N - not started

	week -06				Process	SSC	Negotiate and agree SLAs and SSC performance management			
	week -06				Process	Transition	Finalise requirements for Knowledge transfer			
	week -06				Process	Transition	Knowledge transfer activities agreed - Services to SSC			
	week -06				Systems	Other	Commence QA of Knowledge Base			
	week -06				Process	SSC	SSC Support Desk - Define and agree escalation points, out of hours cover, support issues			
	week -06				Systems	Other	Co-ordinate UATs for Knowledge Base, incl. producing produce test scripts			
	week -06				Process	Transition	Issue BPP Gap status report to project team (Transition and SSCR)			
	week -06				Infrastructure	Infrastructure	Request preparation of security passes for transferring staff			
	week -06				Process	Training	SSC User training			
	week -06				Process	Training	Service User training			
	week -06				Milestone	Milestone	<b>SYSTEM SIGN-OFF FOR PRACTICE SOLUTIONS</b>			
	week -06				Milestone	Milestone	<b>INTEGRATED CUTOVER PLAN AGREED</b>			
	week -05				Comms	Comms	Arrange twice weekly welcome sessions for SSC staff			
	week -05				Process	Transition	Provide Solutions Delivery with retained Service roles (for Systemprofile setup)			
	week -05				Infrastructure	Infrastructure	Provide SSC floor plan and team locations to Office Project			
	week -05				Infrastructure	Infrastructure	Plan records management strategy			
	week -05				Infrastructure	Infrastructure	PIQ As-Is data of staff transferring to SSC and provide output to SSC Office Move Mngr			
	week -05				Infrastructure	Infrastructure	Evaluate Pre Installation Questionnaire (PIQ) As-Is data SSC staff versus storage capacity and advise Office Project of implications/ arrangements			
	week -05				Infrastructure	Infrastructure	Confirm telephone numbers for SSC staff			
	week -05				Infrastructure	Infrastructure	Issue security access passes to transferring staff - with Welcome Pack			
	week -05				Systems	ERP	Map SSC team roles to Systemroles - generic and review with SSC Team Managers			
	week -05				Process	Transition	Carry out final bank reconciliation in legacy system (record O/S cheques older than 6 months in Excel)			
	week -05				Process	Transition	Undertake first bank reconciliation in System- process to be work shadowed by SSC resource			
	week -05				Systems	ERP	STC - final system checks and promote system settings into production system			
	week -05				Process	Transition	Issue Corporate instruction regarding wind-down of IDS for internal charging as part of year end closing programme			
	week -05				Organisation	SSC	Plan resourcing/ team activities - Technical Specialist - for 1st weeks of Go-Live e.g. KB			
	week -05				Systems	Other	Co-ordinate UAT or interim/L-T solutions to include test scripts for Call Logging/Call Handling			
	week -05				Process	Training	Plan training activities for - define req'd documentation or queue cards			
	week -05				Process	Training	Agree training activities for Technical Specialist and Frontline re. Call Logging/Handling - co-ordinate with GP			
	week -05				Systems	Other	Co-ordinate technical considerations of the Knowledge Base			
	week -05				Process	SSC	Draft procedures for handover of calls - 1st and 2nd Line to SSC Frontline and to and from CICT			
	week -05				Process	Transition	Agree actions to fill any significant gaps (if any) in Vendor master data			
	week -05				Recruitment/People	Recruitment/People	Weekly review of recruitment status and Go-Live resourcing position per team			
	week -05				Recruitment/People	Recruitment/People	Obtain final agreement regarding CCs CRB policy and commence any required actions			
	week -05				Comms	Comms	Prepare templates for communicating to SSC stakeholders			
	week -05				Systems	Other	Implement Knowledge base			

week -05				Infrastructure	Infrastructure	Finalise plan for SSC Dry Run event, including specification of any supporting resources required			
week -05				Process	SSC	Negotiate and agree SLAs and SSC performance management			
week -05				Infrastructure	Infrastructure	Confirm roll-in plan for transferring staff (people and equipment)			
week -05				Process	Transition	Finalise and issue process forms			
week -05				Comms	Comms	Prepare and issue SSC newsletter			
week -05				Infrastructure	Infrastructure	Document business continuity plan (ensure consistent with overall SCC approach) and incorporate in SLA/OLA with Services			
week -05				Infrastructure	Infrastructure	Advise Office Project of storage detail and locations per team			
week -05				Process	Transition	Review Vendor list and identify those suitable for EBP			
week -05				Comms	Comms	Prepare templates letter(s) for communication to 3rd parties - Services stakeholders			
week -05				Comms	Comms	Prepare templates for communication to internal stakeholders - Services			
week -05				Comms	Comms	Prepare templates for communicating to SSC external stakeholders			
week -05				Systems	Other	Complete QA of Knowledge Base			
week -05						Technical design and branding of Knowledge Base signed off			
week -05				Systems	ERP	Define and agree Workflow structure			
week -05				Process	Transition	Complete Customer Master template			
week -05				Systems	ERP	Trial load of the Customer Master data (manual or auto as required)			
week -05				Systems	ERP	Check the Customer Master conversion (technically and functionally)			
week -05				Systems	Other	Manage implementation of practise telephony solution			
week -05				Systems	Other	Test practise telephony solution			
week -05				Process	Transition	Establish Service policies			
week -05				Systems	Other	Install Web Income			
week -05				Systems	Other	Test Web Income			
week -05				Systems	Other	Install access to IBR (Income receipts) in SSC AR			
week -05				Systems	Other	Test access to IBR from SSC AR			
week -05				Systems	Other	Install IDS access in SSC			
week -05				Systems	Other	Test IDS access			
week -05				Systems	Other	Test Scorpion			
week -05				Systems	Other	Install access to Car Hire database in SSC Procurement team			
week -05				Systems	Other	Test access to Car Hire database in SSC Procurement team			
week -05				Systems	Other	Confirm that Payroll / Pay Expenditure - Pay/Accountancy (interim system) not required in SSC			
week -05				Systems	Other	Confirm that Ledger access and maintenance not required in SSC in February			
week -05				Systems	ERP	Test Systemaccess			
week -05				Infrastructure	Infrastructure	Test phones, faxes etc.			
week -05				Process	Transition	Process any backlogs in Vendor invoices and Employee expense claims			
week -05				Comms	Comms	Prepare Welcome pack for staff			
week -05				Process	Training	SSC User training			
week -05				Process	Training	Service User training			
week -05				Process	SSC	Prepare scenarios for "a day in the life of the SSC" day			
week -05				Infrastructure	Infrastructure	Circulate induction pack and sign off operating guidelines			
week -04				Organisation	Service	Plan to back fill Service resources from 11th February			
week -04				Process	Transition	Run SSCR BPV session with SSC team managers - agree open/closed gaps and remaining actions required for Go-Live			
week -04				Infrastructure	Infrastructure	Draft documentation / team help aids for DAY 1. Plan floor walkers, pro active assistance			
week -04				Process	SSC	Sign-off SLAs and SSC performance management			
week -04				Process	Transition	Knowledge transfer activities underway			
week -04				Systems	Other	Confirm practise Call logging/handling system in place			
week -04				Infrastructure	Infrastructure	Test practise Call logging/handling system			
week -04				Infrastructure	Infrastructure	Allocate SSC phone numbers			
week -04				Infrastructure	Infrastructure	Confirm SSC back-office support processes in place			
week -04				Systems	ERP	Carry out Regression testing			
week -04				Process	Training	SSC User training			

	week -04			Process	Training	Service User training			
	week -04			Process	Training	SystemPTP training dry-run			
	week -04			Process	Transition	Process any backlogs in Vendor invoices and Employee expense claims			
	week -04			Infrastructure	Infrastructure	Ensure user / team availability for live environment simulation - DRY RUN			
	week -04			Systems	Other	Confirm contingency arrangement			
	week -04			Recruitment/People	Recruitment/People	Review SSC compliance with CRB requirements			
	<b>week -03</b>			<b>Milestone</b>	<b>Milestone</b>	<b>"A DAY IN THE LIFE OF THE SSC" DAY IN SSC</b>			
	week -03			Infrastructure	Infrastructure	Carry out end to end process walk throughs as part of "a day in the life of the SSC" day			
	week -03			Process	Transition	Issue a status statement regarding recoverable receivables for Cluster 1, specifying any actions required pre Go-Live			
	week -03			Systems	ERP	Final Systemrole testing			
	week -03			Comms	Comms	Begin twice weekly welcome sessions for SSC staff			
	week -03			Process	SSC	Cross process review of output of "A day in the life of the SSC" day			
	week -03			Process	Transition	Identify list of Service contracts and supporting details to agree ownership (SSC vs. Service) post Go-Live			
	week -03			Systems	Other	Test Knowledge base			
	week -03			Infrastructure	Infrastructure	Finalise records management strategy			
	week -03			Recruitment/People	Recruitment/People	Weekly review of recruitment status and Go-Live resourcing position per team			
	week -03			Process	Transition	Complete backlog processing e.g. Vendor invoices and Employee expense claims			
	week -03			Process	Training	SSC User training			
	week -03			Process	Training	Service User training			
	week -03			Organisation	SSC	Identify SSC staff to be set -up/ transferred in OM (where transferring from Service)			
	week -03			Comms	Comms	Send communication to 3rd parties - Services stakeholders			
	week -03			Comms	Comms	Send communication to internal stakeholders - Services			
	week -03			Comms	Comms	Provide SSC with list of 3rd parties communicated to, to enable SSC to manage comms going forward			
	week -03			Comms	Comms	Prepare and issue SSC newsletter			
	week -03			Process	Training	Review training status and plan for completion with SSC			
	week -03			Process	Transition	Knowledge transfer activities underway			
	week -03			Systems	Other	Award contract for call handling/logging system			
	week -03			Infrastructure	Infrastructure	C&W change control sign-off			
	week -03			Systems	Other	Knowledge Base system technical and content sign-off			
	week -03			Systems	Other	Start input of Knowledge Base content			
	week -03			Systems	Other	Complete input of Knowledge Base content			
	<b>week -03</b>			<b>Milestone</b>	<b>Milestone</b>	<b>READINESS CHECKLIST REVIEW</b>			
	<b>week -03</b>			<b>Milestone</b>	<b>Milestone</b>	<b>PROGRAMME BOARD</b>			
	week -02			Recruitment/People	Recruitment/People	Weekly review of recruitment status and Go-Live resourcing position per team			
	week -02			Systems	Other	Ensure all SSC staff profiles incorporate Systemaccess			
	week -02			Systems	Other	User testing and training KnowledgeBase commences			
	week -02			Process	Transition	Provide list of PO's likely to be open on 14th February			
	week -02			Process	Transition	Process any backlogs in Vendor invoices and Employee expense claims			
	week -02			Process	Transition	Provide nominated Service contacts to SSC for each process area			
	week -02			Process	Training	SSC User training			
	week -02			Process	Training	Service User training			
	week -02			Systems	Other	Implement final Call Logging/handling system			
	week -02			Organisation	Service	Implement retained Service organisation structure			
	week -02			Systems	ERP	Commence user set-up and role assignment			
	<b>week -02</b>			<b>Milestone</b>	<b>Milestone</b>	<b>EXTERNAL STAFF JOINING THE SSC</b>			
	<b>week -01</b>			<b>Milestone</b>	<b>Milestone</b>	<b>CLUSTER 1 GO/NO-GO CHECKPOINT</b>			

	week -01			Infrastructure	Infrastructure	Deliver crates and labels to Service offices			
	week -01			Infrastructure	Infrastructure	Transferring staff begin to pack for move			
	week -01			Systems	Other	User testing and training KnowledgeBase is concluded			
	week -01			Process	Transition	Sign-off Knowledge transfer (Service to SSC)			
	week -01			Infrastructure	Infrastructure	Implement records management strategy			
	week -01			Recruitment/People	Recruitment/People	Weekly review of recruitment status and Go-Live resourcing position per team			
	week -01			Process	Transition	Final sales invoicing run undertaken in Service			
	week -01			Process	Transition	Copy and send any unpaid sales invoices and invoices in dispute to SSC			
	week -01			Process	Transition	Identify open current Vendor queries/invoices in dispute and handover to SSC with supporting documentation			
	week -01			Process	Transition	Identify open current customer/vendor queries and handover to SSC with supporting documentation			
	week -01			Process	Transition	Batch and send new unprocessed invoices/expense claims to SSC			
	week -01			Process	Transition	Provide Specimen signatures on headed note paper - invoice approval - to SSC, and approval limits			
	week -01			Process	Transition	Provide SSC with any relevant Service policies			
	week -01			Infrastructure	Infrastructure	Transferring staff finish packing for move			
	week -01			Infrastructure	Infrastructure	Removals company pack moving equipment, files, data etc.			
	week -01			Process	Transition	Flag open orders in System to prevent issuance to Vendors			
	week -01			Process	Transition	Migrate open Systemcalls to SSC (if interim solution other than E-Workplace required)			
	week -01			Process	Transition	Raise PO's for large open orders			
	week -01			Process	Transition	Process cutover - Services to SSC			
	week -01			Process	Transition	SSC User training			
	week -01			Process	Transition	Service User training			
	week -01			Organisation	SSC	Set-up/ transfer SSC staff in OM as per agreement			
	week -01			Systems	ERP	All Users communicate with re. SystemID's			
	week -01			Systems	ERP	Activate / de-activate Systemaccess			
	week -01			Systems	ERP	Complete STC user set-up and role assignment			
	week -01			Comms	Comms	Finalise communication to SSC internal stakeholders			
	week -01			Milestone	Milestone	<b>SIGN-OFF OF SSC GOVERNANCE ARRANGEMENTS</b>			
	week -01			Milestone	Milestone	<b>SSC STAFF INDUCTION AT SSC</b>			
	week -01			Milestone	Milestone	<b>PCs and Phones transferring - Service decommissioning</b>			
	week 0			Infrastructure	Infrastructure	Unpack and install PC's, phones,			
	week 0			Infrastructure	Infrastructure	Deliver Welcome briefings			
	week 0			Milestone	Milestone	<b>SSC GO-LIVE</b>			
	week 0			Systems	Other	Complete testing and implementation of Call Logging/handling system			
	week 0			Process	SSC	SSC to run first payment run			
	week 0			Process	SSC	1st bank reconciliation in SSC			
	week 0			Process	SSC	Run first sales invoicing run from SSC			
	week 0			Process	SSC	QA Post Implementation review			
	week 0			Process	Training	SSC User training			
	week 0			Process	Training	Service User training			
	week 0			Comms	Comms	Prepare and issue SSC newsletter			
	week 0			Systems	Other	Activate / de-activate legacy systems access			
	week +3			Milestone	Milestone	<b>HANDOVER TO SSC</b>			
	week +3			Process	SSC	Review Vendor list and identify opportunities for rationalisation			