

# Project Management Framework for an IIS Platform Migration

## Apply project management and change management to guide the migration process

The framework below provides guidance to initiate, plan, execute, monitor and control, and close an IIS platform migration project. Project management and change management activities are embedded within these five industry-standard project phases to help ensure a successful migration. Review the **primary project outputs** to ensure that critical project artifacts are developed. Review the **exit criteria** to help assess readiness to transition from one project phase to another.



### Project Phase 1: Initiate

Define the project and obtain leadership support and authorization to proceed.

#### Primary Project Outputs

- Project charter
- Stakeholder analysis matrix

#### Exit Criteria

- ✓ Benefits outweigh risks
- ✓ Strong executive sponsorship
- ✓ Funding secured
- ✓ Charter signed



### Project Phase 5: Close

Obtain sponsor's approval to formally close the project and transition into maintenance and operations.

#### Primary Project Outputs

- Project post-mortem
- Final project status report
- Final project schedule
- Final RAID log

#### Exit Criteria

- ✓ System feedback mechanism in place
- ✓ Project documentation archived
- ✓ Completed post-mortem



### Project Phase 2: Plan

Determine critical aspects in managing the overall project scope and work.

#### Primary Project Outputs

- Kickoff meeting
- Project management plan(s) addressing:
  - Project governance
  - Project budget
  - Project schedule
  - Resource management
  - Change management
  - Communications
  - Risk management
  - Change control
  - Requirements management
  - Procurement\*
  - Data cleansing, migration and validation
  - Testing
  - Training
  - Go-live/implementation

#### Exit Criteria

- ✓ Defined project scope
- ✓ Defined deliverables, milestones and timeline
- ✓ Identified and committed resources



### Project Phase 3: Execute

Execute plan(s); complete quality deliverables to meet stated objectives and requirements.

#### Primary Project Outputs

- Communication artifacts
- Requirements documentation
- Procurement and artifacts\*
- Data cleansing, migration and validation artifacts
- Testing results
- Help desk processes
- Training artifacts
- Go-live/implementation artifacts

#### Exit Criteria

- ✓ Redesigned business processes
- ✓ Documented priority system requirements
- ✓ Procured external resources/products\*
- ✓ Signed service level agreement(s)\*
- ✓ Approved contingency plan

\*If external technology and/or services are procured.



### Project Phase 4: Monitor & Control

Monitor the quality of deliverables, control project constraints and refine plan(s) as needed.

#### Primary Project Outputs

- Contract artifacts\*
- Project status reports
- Updated project management plan(s)
- Updated project schedule
- Project meeting agendas and notes
- Project change requests
- Updated/new standard operating procedures (SOPs)
- Risks, actions, issues, decisions (RAID) log

#### Exit Criteria

- ✓ System satisfies approved requirements
- ✓ Defects reviewed and scheduled for resolution
- ✓ Move to production approved
- ✓ Executed training for staff and end users
- ✓ Completed operational documentation (e.g., SOPs, operational processes)
- ✓ Executed implementation plan