



# Basic Planning and Scheduling for Change

## 1. Establish a Schedule

Creating a schedule is fundamental to the success of any change initiative. Schedules are important in coordinating activities, allocating resources effectively, and maintaining momentum throughout the change process.

### Objectives of Scheduling

- ✓ **Tracking Progress:** Track activities against planned objectives to ensure the project remains on track.
- ✓ **Resource Management:** Efficient allocation of resources
- ✓ **Risk Mitigation:** Proactively identifying potential delays or conflicts and allowing for timely adjustments in plans.

### Establish a Scheduling Practices

- ✓ **Define and Sequence Tasks:** Identify all necessary activities for the change process and determine their logical order, considering dependencies to ensure smooth progression.
- ✓ **Allocate Resources and Timeframes:** Assign team members based on their skills and availability and set realistic deadlines for each task to manage time and resources efficiently.
- ✓ **Continuous Review:** Regularly assess the schedule against project developments, adjusting plans as needed to accommodate changes and maintain alignment with project goals.

## 2. Migration Timeline Phases

This section details an example migration timeline divided into phases, each a defined stage that systematically guides the transition to new software. Each phase includes essential steps and activities for a seamless progression from planning to post-implementation review. **Note:** *Phases may differ depending on the project scope.*

### 1. Planning



- ✓ Conduct stakeholder meetings to define the project scope and assemble the project team.
- ✓ Initiate the requirements gathering to outline system needs and user requirements.

### 2. Setup



- ✓ Procure and install software, configure according to requirements, and develop a data migration plan.
- ✓ Perform system integration testing to ensure compatibility with existing systems.

### 3. Training



- ✓ Develop and customise training materials based on user roles; conduct training sessions including refresher courses on advanced features.
- ✓ Schedule and conduct training sessions for end users.

### 4. Go-Live



- ✓ Finalise data migration, validate data, and execute deployment with contingency plans in place.
- ✓ Communicate go-live date and expectations to stakeholders and end users

### 5. Hypercare



- ✓ Monitor system performance, address user-reported issues, and implement necessary software updates.
- ✓ Conduct a post-implementation review to assess project success and gather lessons learned.

## 3. Key Milestones

Key milestones are crucial checkpoints in any schedule, ensuring alignment with the project timeline, tracking progress, and facilitating effective communication and coordination among stakeholders.

### Milestone Management Practices

- ✓ **Strategic Placement:** Set milestones at critical points in the project to signify significant achievements and serve as progress checkpoints.
- ✓ **Governance Meetings:** Conduct regular reviews around each milestone to assess achievements, resolve issues, and realign the project plan, as necessary.

## 4. Project Team Alignment

Project team alignment is essential for the success of the migration project as it drives task execution, issue resolution, and progress across phases, ensuring alignment with project objectives and timelines.

### Project Alignment Practices

- ✓ **Regular Schedule Reviews:** Hold frequent meetings to update the team and adjust timelines as needed.
- ✓ **Transparent Communication Tools:** Use accessible project management software to maintain clear visibility of schedules.
- ✓ **Clear Roles and Responsibilities:** Define and communicate each member's tasks clearly to avoid overlap and ensure efficiency.