



Transition Plan Template for ISO 37500:2014

1. Project Overview

- **Project Name:**
- **Date:**
- **Prepared By:**
- **Version:**

2. Objectives of the Transition

- Outline the main goals of the transition (e.g., improved efficiency, cost savings, access to expertise).

3. Scope of Transition

- Define the scope of the services being transitioned.
- Include details about the specific processes, functions, or services involved.

4. Stakeholders

- **List of Key Stakeholders:**
 - Name/Title/Role
- **Stakeholder Responsibilities:**
 - Define each stakeholder's role in the transition process.

5. Transition Team

- **Team Members:**
 - Name/Title/Role
- **Responsibilities:**
 - Outline specific responsibilities for each team member.

6. Transition Timeline

Phase	Start Date	End Date	Responsible Party	Comments
-------	------------	----------	-------------------	----------

Planning				
----------	--	--	--	--



Phase	Start Date	End Date	Responsible Party	Comments
-------	------------	----------	-------------------	----------

Communication				
---------------	--	--	--	--

Knowledge Transfer				
--------------------	--	--	--	--

Implementation				
----------------	--	--	--	--

Go-Live				
---------	--	--	--	--

Review				
--------	--	--	--	--

7. Resource Requirements

- **Human Resources:**
 - Specify any personnel needed for the transition.
- **Technical Resources:**
 - Outline any tools, systems, or technology required.
- **Budget:**
 - Provide an estimated budget for the transition.

8. Knowledge Transfer Plan

- **Training Requirements:**
 - Detail any training sessions needed for staff.
- **Documentation:**
 - List the documents and resources that need to be shared with the service provider.

9. Risk Management

Risk Description	Likelihood	Impact	Mitigation Strategy
------------------	------------	--------	---------------------

10. Communication Plan

- **Internal Communication:**
 - Describe how information will be communicated to staff.



- **External Communication:**

- Outline communication strategies for engaging with the service provider and other stakeholders.

11. Go-Live Preparation

- **Final Checks:**

- List final checks and validations to ensure readiness for the transition.

- **Launch Day Activities:**

- Describe activities that will take place on the launch day.

12. Post-Transition Review

- **Evaluation Metrics:**

- Define how the success of the transition will be measured.

- **Review Schedule:**

- Specify when and how reviews will be conducted post-transition.

13. Sign-off

- **Project Sponsor:**

- Name/Title/Signature/Date

- **Transition Team Lead:**

- Name/Title/Signature/Date

This template provides a structured approach to planning and executing the transition of services to an outsourced provider, ensuring all critical aspects are considered and managed effectively.