

Implementation Management Plan

Tyler Technologies

SAMPLE

Table of Contents

Introduction.....	4
Scope Management Plan.....	5
Purpose.....	5
Scope Management Approach	5
Scope Roles and Responsibilities.....	5
Project Scope Statement	6
Scope Verification.....	6
Scope Control	6
Scope Change	6
Communication Plan	8
Purpose.....	8
Communications Planning.....	8
Information Distribution.....	8
Roles and Responsibilities	8
Sample Communication Plan Matrix	9
Resource Management Plan	12
Purpose.....	12
Physical Resource Requirements.....	12
Facility Resource Matrix	12
Human Resources Requirements Matrix.....	14
Quality Management Plan.....	15
Purpose.....	15
Quality Approach.....	15
Quality Planning	15
Quality Assurance	15
Quality Control	16
Risk Management Plan	17
Purpose.....	17
Risk Assessment Procedures	18
Risk Management Procedures.....	18
Risk Measuring and Control Procedures	18
Risk Register	19

Risk Assessment 20

Risk Evaluation..... 21

Probability and Impact Matrix..... 22

Risk Management Planning 22

Risk Measuring and Control..... 24

Quality Control Checklist 25

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Introduction

All successful implementations require strategic planning, performed at various stages throughout the project lifecycle. This Implementation Management Plan is a compilation of what Tyler considers to be some of the most important management plans needed during implementation. Please make sure to add the Client's Change Management Plan to the Project SharePoint, as well as any other relevant management plans that may have been developed.

One of the biggest challenges faced with Management Plans is actually putting them to use. Too often, the burdens of day-to-day project activities seem to outweigh the importance of having a plan in place; especially one that is clearly communicated, carefully followed, and revised as needed. Tyler's implementation methodology carefully establishes a formal placeholder for planning sessions at the onset of each phase and requires acceptance of the Management Plan as a deliverable.

Scope Management Plan

Purpose

The focus of the Scope Management Plan is on managing the scope of the project as it is defined at the onset of the project/phase and determining when changes are to be considered, how requests are to be processed through the organization, and who is involved in authorizing the change to scope.

This plan documents the scope management approach, roles and responsibilities as they pertain to scope change control. Any project communication which pertains to the project's scope should adhere to the Scope Management Plan.

Scope Management Approach

It is important to clearly define the approach to managing the project's scope. This section provides a summary of the Scope Management Plan and addresses the following:

- Authorities and responsibilities for scope management
- Scope change process (who initiates, who authorizes, etc.)

Scope management will be the responsibility of both the Client and Tyler Project Managers. The scope for this project is defined by the Statement of Work and the Agreement.

Scope Roles and Responsibilities

In order to successfully manage a project's scope, it is important to clearly define all roles and responsibilities for scope management. This section defines all of the project roles of those who are involved in managing the scope of the project. It should state who is responsible for scope management and who is responsible for accepting the deliverables of the project as defined by the project's scope. Any other roles in scope management should also be stated in this section.

The Project Managers, Sponsor and project team will all play key roles in managing the scope of this project. As such, the Project Sponsor, Project Managers, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope throughout the entire duration of the project. The table below defines the roles and responsibilities for scope management.

Name	Role	Organization	Responsibility
	Project Manager	Client	Evaluate Change Request, Prepare Change Request Form
	Project Manager	Tyler	Prepare response to Change Request Form, Evaluate impact to schedule, budget
	Steering Committee	Client	Evaluate the recommendations from the Project Team, weigh the benefits vs. cost of budget/timeline impact, make decisions on scope changes
	Project Sponsor	Client	

Project Scope Statement

The scope for this project is defined by the Statement of Work and the Agreement.

Scope Verification

As the project progresses, the Client Project Manager will verify project deliverables and control points against the Project Scope Statement. Once the Client Manager verifies that they meet the requirements, the Client Project Manager complete the acceptance of the deliverable/Control Point. This will ensure that project work remains within the scope of the project on a consistent basis throughout the life of the project.

Scope Control

The Project Managers and the project team will work together to control of the scope of project. The project team will ensure that they perform only the work described in the project scope statement. The Project Manager will oversee the project team and the progression of the project to ensure that this scope control process is followed and progress is reported through Project Scope measurements tools as defined above in the project scope statement.

Scope Change

If a change to project scope is needed, the process for recommending and estimating changes to the scope of the project must be carried out. Any Client project team member or Sponsor can request changes to the project scope. All change requests must be submitted to the Client Project Manager in the form of a project change request document. The Client Project Manager will then review the suggested change to the scope of the project. The Client Project Manager will then either reject the change request if it does not apply to the intent of the project, or convene a Change Control meeting with the project team and Steering Committee to review the change request further and determine if the Client is ready to submit a change request to Tyler to gather cost and schedule information, so a full impact assessment of the change can be performed.

Upon receipt of a change request document, Tyler Project Manager will review the request with the appropriate Tyler resources to determine if the scope change can be accomplished and/or meets the

products' requirements, depending on whether the change is one requiring implementation services or product change. If Tyler decides to move forward with the scope change, the Tyler Project Manager will prepare a Scope Change Form, including any budgetary or schedule impacts, and a description of the services and/or product change. The Scope Change Form will be provided to the Client Project Manager for review with the project team and Steering Committee.

If the Client Project Manager and Steering Committee approve the Scope Change Form, the Tyler Project Manager will determine if further action is required before proceeding with the scope change. The Client and Tyler Project Managers will update all project documents and communicate the scope change to all project team members' stakeholders.

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Communication Plan

Purpose

The purpose of the Communication Plan is to detail how communications will be managed throughout the project life cycle. The plan will include all planned and periodic communications occurring between the project stakeholders, scheduled written and oral communication, the frequency of the scheduled communications and the responsible person(s) for providing the information. A routine communication plan will aid all Project team members, of both the Client and Tyler, in understanding the goals, objectives, current status and health of the Project.

Communications Planning

Communication Planning determines the information and communications needs of the project. Here we will identify who needs what information, when they will need it, how it will be given to them, and by whom. Identifying the informational needs of the stakeholders and determining a suitable means of meeting those needs is an important factor for project success. In addition to documenting the approach to communications identification and analysis, the plan should cover who is responsible for managing communications, how communications will be tracked throughout the project lifecycle, and how mitigation and contingency plans are developed and implemented.

Information Distribution

Throughout the project, this plan will be maintained to ensure that necessary information is made available to project stakeholders in a timely manner. This plan will impact the following members:

Members	Inform	Involve	Invoke Action	Gain Buy-In
Project Team	√	√	√	
User Group	√	√		√
Stakeholder Group	√	√		√
External / Public Audience	√			√

Roles and Responsibilities

In order to successfully manage project communication, it is important to clearly define all roles and responsibilities for communication management. This section should define the communication role of the Project Manager, Project Team, Stakeholders and other key persons who are involved in the project. It should state who is responsible for each communication. The participants and stakeholders involved in managing project communications are defined in the Communication Matrix. In some cases, one individual may perform multiple roles in the process. At a minimum, we recommend the items in the Sample Communication Matrix be assigned and implemented.

Sample Communication Plan Matrix

Message	Objective/ goal	Target Audience	Owner(s)	Frequency	Medium or method	Timing	Notes
Stakeholder Presentation	Reasons for upgrade; WIIFM; overall project timeline; who to contact with questions, high level scope outline	Functional Leaders, Project Team, Stakeholders	Client PM, Tyler PM	Start of overall project	Group presentation	Early Nov	Cover: What, Why, When, Who, Where Do we need anything from end users yet?
Project Planning Meetings	Roles and responsibilities will be outlined as well as Implementation Management Plans and initial schedule development.	Client Project Manager, Phase Functional Leaders	Tyler PM, Client PM	Start of overall project	Presentation and Planning Document	Early Nov	Bring blackout dates to meeting
Executive Mandate	Organization will understand the purpose and importance of the project as well as the level of commitment required to make it successful.	Entire Organization	Client Executive Officer	Start of overall project	Email	Early Nov	Recognize challenges and emphasize long term value
Executive Project Status Updates	Provide overall project direction and status.	Client Management; Sponsors	Client PM	Quarterly at Steering Committee meeting	Status Reports, Budget Reports	Start in Jan	

Message	Objective/ goal	Target Audience	Owner(s)	Frequency	Medium or method	Timing	Notes
Client Project Team Meetings	Provide key project participants with detailed information regarding project task status, schedules, progress, and budget.	Functional Leaders, Project Team	Client PM	Weekly	Status Reports, In Person Meetings	Every Tues at 9am in Conference Room A	
Tyler Status Meetings	Provide effective and timely communication to the Client PM on the status of the Tyler Project at a detailed level. The goal is to keep the project team abreast of the current project status, project issues, upcoming events, and project milestones at a detailed level. Delivery point will be to Client PM for distribution to the Project Team.	Tyler PM and Client PM	Tyler PM	Bi-Weekly until 90 days from LIVE, then Weekly	Status Report	Every other Wed at 9am	Review schedule, issues and actions, deliverables
Project Plan	Communicate clearly defined tasks, milestones, schedules and dependencies.	Client Project Manager, Functional Leaders, Project Team	Tyler PM	Evolving	SharePoint	Updated weekly	

Message	Objective/ goal	Target Audience	Owner(s)	Frequency	Medium or method	Timing	Notes
Project Sign-Offs	Provide clear acceptance and authorization to proceed to next step in implementation.	Client Project Manager, Functional Leaders, Project Team, Tyler PM	Tyler PM	Evolving	Hardcopy, or Electronic Approval		
Project Web Space	Provide information and support for the project goals to the community and organization	Functional Leaders, Project Team, Organization, Community	Client PM	Evolving	Client Intranet and Website		
FAQ Document	Answer frequently asked questions about the project and its benefits	Organization	Client PM	Evolving	TBD		

Resource Management Plan

Purpose

The purpose of the Resource Management Plan is to identify and define the necessary roles and positions needed to support the project successfully, as well as other types of needed project resources such as training facilities, meeting space, offices, and equipment. Knowing when, and for how long, each resource is needed is critical to planning and controlling project costs, staff backfill requirements, and everyday project management logistics.

Physical Resource Requirements

- Analysis Facility
 - Conference Room or open meeting space free of interruptions to accommodate all users comfortably
 - Space for attendees to take notes and organize documents
 - Internet connection
 - Projector and screen
 - White board/smart board or flip chart
 - Speaker phone
- Training Facility – Functional Leads, Power Users and End Users
 - Training environment free of interruptions
 - Space for trainees to take notes and organize documents
 - Internet connection
 - Access to the Tyler system
 - Projector and screen
 - A working networked Tyler printer
 - Speakerphone
 - White board/smart board or flip chart
 - Ideally one computer per user being trained and a trainer computer

Facility Resource Matrix

	Analysis 1	Analysis 2	Training 1	Training 2
Room name/number				
Exact location				
Purpose (analysis, training, decentralized training, backup)				
Number of computers				

Is there a separate station for the instructor?				
Total capacity				
Networked printer available?				
Is there access to the Tyler system? Or estimated date for access.				
Number of internet connections (or note if wireless)				
Speakerphone?				
Whiteboard or flipchart?				
First date available				
End date available				
Is room dedicated to project? If not, who reserves it?				
Is there a permanent projector & screen? If not, who reserves them?				
Is the room locked? If so, who will have access?				
Other room considerations				

Human Resources Requirements Matrix

[illegible]

A=proficient, B = well experienced, C = experienced, D = basic

Quality Management Plan

Purpose

The purpose of the quality management plan is to define the responsibilities, activities, and metrics used in measuring and ensuring quality throughout the project. As with all projects, quality crosses various layers of work; implementation, processes, deliverables, software, and management. All layers require scrutiny and continuous adjustment in order to ensure project success, more commonly known as: Plan, Do, Check, Act.

Quality Approach

The project quality approach for this project involves stakeholders and all other project team members beginning at the inception of project stages. This allows the team to focus on items related to quality in the initial stages so that specific quality activities and standards are incorporated right from the start. The project will also use status reports as a tool to communicate any quality risks or issues that arise.

Quality Planning

Identify Quality Metrics

The Project Team must agree on the metrics by which quality will be measured. For instance, if a process can be achieved in the software “out of the box,” but requires a process change that users are resisting because it represents change, the Project Team should agree to assign a metric of “Pass.” Likewise, if a core software process required for production processing cannot be completed successfully in a test scenario, there are no viable work-arounds available, the Project Team should agree to assign a metric of “Fail,” and submit it for re-testing.

Establish Quality Control Checklist

The quality management plan identifies the quality control checklist that will be used throughout the project. A baseline quality control checklist has been attached as a starting point for the project but may be modified or added to as needed.

Issue Resolution

The Client Project Manager will schedule separate meetings, as needed, to discuss project process improvements and determine corrective actions. The results of the meeting activities are then documented and acted on, where possible, so that future project phases are improved by incorporating lessons learned. This approach minimizes issues at the end of the project and facilitates a successful production cutover. These meetings should be addressed as part of the Schedule Management Plan.

Quality Assurance

Quality assurance is focused on the project's processes and, when executed properly, provides confidence that quality requirements can be fulfilled. The iterative process for providing quality assurance will include review and completion of the following for each phase of the project:

- Control Point 1: Initiate & Plan Stage Acceptance
- Control Point 2: Assess & Define Stage Acceptance
- Control Point 3: Build & Validate Stage Acceptance
- Control Point 4: Final Testing & Training Stage Acceptance
- Control Point 5: Production Cutover Stage Acceptance
- Control Point 6: Phase/Project Closure Stage Acceptance

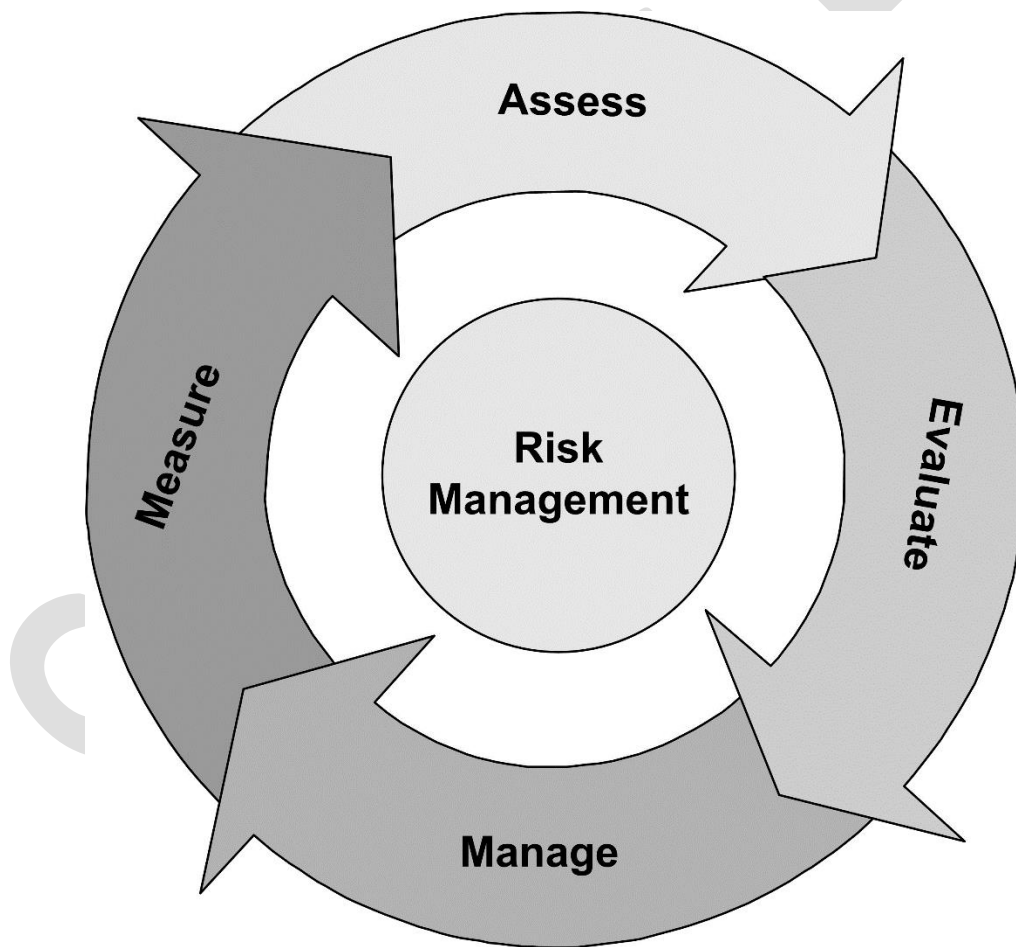
Quality Control

Quality control is focused on the project's product as opposed to its processes. It involves listing all of the expected deliverables, testing activities, acceptance criteria, and quality control owners. This list may include items that extend beyond Tyler's involvement, but should be maintained as one, cohesive quality control checklist. The checklist is a document that will likely change over the life of the project as lessons learned influence future quality planning.

Risk Management Plan

Purpose

A Risk Management Plan defines methods and procedures for assessing and dealing with internal or external threats that could potentially undermine the implementation. The following diagram illustrates the key elements of a comprehensive risk management plan and the lifecycle of how risk can be defined and managed during the project.



Risk Assessment Procedures

The risk assessment process should identify the likelihood of all potential risks and the impact on the organization if that threat occurred.

The following tables should be customized for this project, based on the organizational structure and complexity of the Client.

Process	Owner	Time Estimate
A meeting with Functional Leads and other identified team members will be held to identify risks using a SWOT analysis.	Tyler PM Client PM	1 hour session
The Risk Register is updated with the identified risks, and other required information.	Client PM enters Client risks; Tyler PM enters Tyler risks, collaborates with Client PM	1 hour effort
E-mail: At the end of each of the above activities, the Project Team and other Client attendees will be asked to e-mail the Client PM with any additional opportunities or risks that occur to them after the session. Client PM will update the Risk Register with the identified risks.	Stakeholders Client PM	1 hour for responses 1 hour documentation

Risk Management Procedures

Process	Owner	Time Estimate
Risks with scores higher than 14 will be assigned to the Project Team, Power Users, and Executive Sponsor/Management if necessary. Each risk owner will be assigned to develop strategies avoid, if possible, or mitigate/transfer the risk, or to increase the chance for an opportunity. Risk owners are given 1 week to complete.	Project Team Client Executive Sponsor (if needed), Tyler Executive Management (if needed)	4 hours
The Project Team will discuss the risk response strategies and agree on the response to be taken should a risk trigger occur, or if it's about to occur. These responses should be documented in the risk register.	Project Team	2 hours

Risk Measuring and Control Procedures

Process	Owner	Time Estimate
Monitoring: Risk owners are responsible for monitoring their risks and notifying the appropriate PM via e-mail when a trigger occurs and that the response plan has been initiated.	Risk Owners	4 hours
New Risk Identification: Any stakeholder can identify additional risks. The stakeholder should notify the PM of the new risk (or possible risk) via e-mail.	Stakeholders	1 hour
Audits: The PM will be responsible for overseeing risk activities and ensuring the risk register is updated.	Client PM Tyler PM	2 hours per month
Review: The project team will review the project's high priority risks biweekly and all risks monthly.	Project Team Tyler PM Client PM	1 hour per month
Reporting: Risks will be reported in two ways. First, the Tyler PM and Client PM maintain a Risk Register in a central location accessible by both parties. The Risk Register will contain a list of risks identified for the project, the priority of the risk, the risk owner, and a current status of any active risks. Second, the status report will contain a summary of the high priority risks and any new risks identified and added to the Risk Register.	Client PM Tyler PM Tyler PM	1 hour per month

Risk Register

The project's risk register will be created and maintained during the risk management process and will become part of the Implementation Management Plan. All identified risks should be entered in the register.

Entered in the risk register during or after Risk Assessment¹:

- Risk ID – A unique identifier for the risk. To be used when referring to risks in meetings and communications.
- Title – A description of the risk.
- Description of Impact on Project if Risk Occurs – If the risk occurs, will it impact scope, schedule, cost, user satisfaction, etc.?
- Possible Triggers – Listing of the triggers of the risk.
- Date Reported – The date the risk was identified.
- Status – Identifies whether the risk is a priority, on the watch list, or closed (see risk response section below).
- Probability – The likelihood that the risk will occur. See the Risk Evaluation section below for possible values.

¹ Exact headings may vary.

- Impact – The effect on project objects if the risk event occurs.
- Risk Score – Reflects the severity of the risks effect on objectives. The risk score is determined by multiplying the risk probability and risk impact values. The intent is to assign a relative value to the impact on project objectives if the risk in question should occur.

Entered in the risk register during or after Risk Management Planning:

- Current Owner – Person(s) responsible for the risk if it should occur.
- Response Strategy – The strategy that is most likely to be effective.
- Risk Response Plan – Specific actions to enhance opportunities and reduce threats to the project's objectives based on the most likely strategy.

Risk Assessment

For the purpose of this Implementation Management Plan, Tyler has selected the SWOT Analysis risk assessment technique. While there are other options available, and the Client may augment their Risk Analysis using other techniques, the following outline will be used for the Tyler Implementation.

SWOT Analysis

A SWOT Analysis is a strategic planning tool used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in a project or in a business venture. Strengths and weaknesses are internal to an organization. Opportunities and threats originate from outside the organization.

SWOT analysis, usually performed early in the project development process, helps organizations evaluate the environmental factors and internal situations facing a project. Strengths and weaknesses are attributes that measure your internal capability.

Opportunities and threats refer to how the external environment affects your team/business/group. Ideally a cross-functional team or a task force that represents a broad range of perspectives should carry out SWOT analyses.

SWOT Analysis Template

Project Name:
Prepared by:
Date:
Project Manager:
SWOT Analysis Facilitator:
SWOT Analysis Participants:

SWOT Analysis Recorder:
Date of SWOT Analysis:
Project Strengths: (What potential strengths exist about the project, the project team, the sponsor, the organization structure, the client, the project schedule, the project budget, the product of the project, and so on?)
1.
2.
3.
4.
Project Weaknesses: (What potential weaknesses exist about the project, the project team, the sponsor, the organization structure, the client, the project schedule, the project budget, the product of the project, and so on?)
1.
2.
3.
4.
Project Opportunities: (What potential opportunities exist in regard to achieving the project requirements, the product requirements, the project schedule, the project resources, the project quality, and so on?)
1.
2.
3.
4.
Project Threats: (What potential threats exist in regard to achieving the project requirements, the product requirements, the project schedule, the project resources, the project quality, and so on?)
1.
2.
3.
4.

Risk Evaluation

Each identified risk should be assigned a probability score and an impact score and these should be recorded on the risk register. The scores may change over the course of the project, so should be reviewed

and updated regularly. For instance, a risk may have a low impact at the start of the project, but may have a high impact as the project progresses.

Likelihood or Probability of each risk

5	Very likely to occur
4	Probably will occur
3	May occur
2	Unlikely to occur
1	Very unlikely to occur

Potential Impact of each risk on the project

5	Event poses very high cost, schedule, or other failure
4	Event poses major cost, schedule, or other increases
3	Event poses moderate increases, but requirements may still be met
2	Event poses small increases, but requirements may still be met
1	Event has little impact on the project

Probability and Impact Matrix

After determining risk scores for each risk's probability and impact, use the following scale to determine the risk priority. Risks with ratings (Risk rating = probability score x impact score) of 10 or higher should be evaluated and reviewed regularly, and should appear on the status reports. Medium and Low risks should be monitored and scores should be re-evaluated throughout the project, as impact and probability change.

	Impact					
		1	2	3	4	5
Probability	5	5	10	15	20	25
	4	4	8	12	16	20
	3	3	6	9	12	15
	2	2	4	6	8	10
	1	1	2	3	4	5

After determining the risk ratings for each identified risk, the Risk Register should be updated to reflect the appropriate status for each risk. At this time, each risk will have a status of either "Watch List" for risk scores less than 10, or "Priority" for risk scores of 10 or higher.

Risk Management Planning

Management of risk should be planned for all high priority risks (risk score of 10 or greater) to plan for what will need to happen if the risk is triggered. Risks will be assigned risk owners who will be responsible for watching the risks and implementing these responses if the causes that trigger the risks have occurred, or are about to occur. The risk owners should also identify secondary risks that occur as a result of implementing the risk response, or risks that remain after the response has been implemented.

The following strategies will be used for determining the appropriate response for each risk or opportunity and should be recorded for each high priority risk, along with the chosen response for the risk.

- Threats:

- *Avoid* – Risk avoidance entails changing the Project Plan to eliminate the risk or condition or to protect the project objectives from its impact.
- *Transfer* – Risk transference is seeking to shift the consequence of a risk to a third party together with ownership of the response. Transferring the risk simply gives another party responsibility for its management; it does not eliminate it.
- *Mitigate* – Risk mitigation seeks to reduce the probability and/or consequences of an adverse risk event to an acceptable threshold. Taking early action to reduce the probability of a risk's occurring or its impact on the project is more effective than trying to repair the consequences after it occurs.
- *Accept* – This technique indicates that the project team has decided not to change the Project Plan to deal with a risk or is unable to identify any other suitable response strategy.
- Opportunities:
- *Exploit* – Exploitation entails taking actions to ensure that the opportunity will occur and that the project will benefit from it.
- *Share* – Sharing the opportunity is seeking to shift the consequence of a risk to a third party in order to gain benefit for the project. Transferring the risk simply gives another party responsibility for its management; it does not eliminate it.
- *Enhance* – Enhancing seeks to increase the probability and/or impact of an opportunity. Taking early action to increase the probability of an opportunity occurring or its impact on the project is more effective than taking no proactive action, yet hoping that it might occur.
- *Accept* – This technique indicates that the project team has decided not to change the Project Plan to deal with an opportunity or is unable to identify any other suitable response strategy.

- Opportunities:

- *Exploit* – Exploitation entails taking actions to ensure that the opportunity will occur and that the project will benefit from it.
- *Share* – Sharing the opportunity is seeking to shift the consequence of a risk to a third party in order to gain benefit for the project. Transferring the risk simply gives another party responsibility for its management; it does not eliminate it.
- *Enhance* – Enhancing seeks to increase the probability and/or impact of an opportunity. Taking early action to increase the probability of an opportunity occurring or its impact on the project is more effective than taking no proactive action, yet hoping that it might occur.
- *Accept* – This technique indicates that the project team has decided not to change the Project Plan to deal with an opportunity or is unable to identify any other suitable response strategy.

The Risk Register should be updated upon completion of risk management planning. If the risk plan is to mitigate, the original probability and impact scores should be updated to reflect the current status, as the scores will likely be lower than before risk management planning. Risk Owners should be assigned to all risks at this time.

The Project Plan should be updated to incorporate any activities associated with risk response plans that will be implemented. Risk response activities that will be implemented only if a risk trigger has occurred or is about to occur should not be entered into the Project Plan at this time.

Risk Measuring and Control

Risks must be continuously measured, monitored and controlled throughout the project. Newly identified risks should be added to the risk registers and the steps performed earlier in the process (risk assessment and risk management planning) should be performed. In addition, identified risks should be monitored and updated, as probability and impact change throughout a project. Risks may also no longer pose a threat or opportunity and may be closed.

Risk Owners should review their assigned risks regularly to determine if a trigger is about to occur, or if it has occurred, so they can implement the risk response plan.

Regular updates to the Risk Register and the Project Plan are necessary throughout this process.

There are many different tools that can be used to create a risk register including MS Word, MS Excel, SharePoint, OneNote etc. Make sure the register is updated frequently and includes the elements discussed earlier in this document and outlined in the sample below.

Sample Risk Register:

Project Documents	ID	Title	Description of Impact	Possible Triggers	Date Reported	Status	Category	Probability	Impact	Risk Score (Prob x Impact)	Current Owner	Strategy	Response Plan	Plan Type	Issue/Action?
Agendas Status Reports Implementation Site Reports Conversion Documents Tyler Forms Process Documentation	70	Weather/Travel delays cause a planned session to be delayed or cancelled.	If the day is critical, the schedule can be impacted. Scope is unlikely to be impacted.	Mother Nature	8/14/2015	New	Training	3=May occur	2-Event poses small increases, but requirements may still be met	6 = Watch list	Tyler and Client Project Managers	Accept	Sessions can be conducted remotely. Additional days may need to be built into schedule.	Risk	No
Project Planning Master Project Calendar Master Project Plan Master Issues & Actions Communication Plan Testing Plan Risk Register	71	Employee Turnover	Key employees retiring or leaving current position. Can impact schedule and budget depending on timing.	Retirement; change aversion	8/20/2015	Priority-Risk	Personnel	3=May occur	5=Event poses very high cost, schedule, or other failure	15 = Priority	Client PM and Dept heads	Mitigate	Will have discussions with key employees entering retirement age to determine their plans. Will adjust key project representatives as needed.	Risk	No
Add new item															

Quality Control Checklist

ID	TYPE	TITLE	SCOPE	ACCEPTANCE	ACCEPTED			REVIEWER	DATE	COMMENTS
				CRITERIA	Yes	No	N/A			
1	D	Implementation Management Plan	The Implementation Management Plan addresses how communication, quality control, risks/issues, resources and schedules, and Software Upgrades (if applicable) will be managed throughout the lifecycle of the Project.	Review and acknowledge receipt of Implementation Management Plan						
2	D	Project Plan/Schedule	Task list, assignments and due dates	Acceptance of schedule based on resource availability and Project budget and goals						
3	CP	Hardware Installed (if applicable)								
4	CP	System infrastructure audit complete and verified	Client complete the system infrastructure audit, ensuring vital system infrastructure information is available to the Tyler implementation team, and verifies all hardware compatibility with Tyler solutions	N/A			x			

ID	TYPE	TITLE	SCOPE	ACCEPTANCE	ACCEPTED			REVIEWER	DATE	COMMENTS
				CRITERIA	Yes	No	N/A			
5	CP	Stakeholder Presentation complete	Client stakeholders join Tyler Project Management to communicate successful Project criteria, Project goals, Deliverables, a high-level milestone schedule, and roles and responsibilities of Project participants	N/A			x			
6	D	Completed analysis Questionnaire (Design Document)	Provide comprehensive answers to all questions on Questionnaire(s)	Acceptance of completed Questionnaire based on thoroughness of capturing business practices to be achieved through Tyler solution.						
7	D	Data conversion summary and specification documents	Data conversion approach defined, data extract strategy, conversion and reconciliation strategy	Data conversion document(s) delivered to the Client, reflecting complete and accurate conversion decisions						
8	D	Modification specification documents, if contracted	Design solution for Modification	Client accepts Custom Specification Document(s) and agrees that the proposed solution meets their requirements						
9	D	Completed Forms options and/or packages	Complete Forms package(s) included in agreement and identify Reporting needs	Identify Forms choices and receive supporting documentation						

ID	TYPE	TITLE	SCOPE	ACCEPTANCE	ACCEPTED			REVIEWER	DATE	COMMENTS
				CRITERIA	Yes	No	N/A			
10	D	Installation checklist	Tyler will conduct an initial coordination call, perform an installation of the software included in the Agreement, conduct follow up to ensure all tasks are complete, and complete server system administration training	Tyler software is successfully installed and available to authorized users, Client team members are trained on applicable system administration tasks						
11	CP	Tyler software is Installed	Purchased software and required peripheral software is installed	Installation completes successfully and applications can be opened						
12	CP	Fundamentals review is complete	Fundamentals review provided, including the use of eLearning, videos, documentation, and/or walkthroughs	Basic understanding of system functionality						
13	CP	Current/Future state analysis completed	Evaluate current state processes, options within the new software, pros and cons of each option based on current or desired state	Questionnaires delivered and reviewed						
14	CP	Data conversion mapping and extractions completed and provided to Tyler					x			

ID	TYPE	TITLE	SCOPE	ACCEPTANCE	ACCEPTED			REVIEWER	DATE	COMMENTS
				CRITERIA	Yes	No	N/A			
15	CP	Standard 3rd Party Data Exchange Planning	Define/confirm which Data Exchanges are needed (if not outlined in the Agreement). Tyler will provide a file layout for each Standard Data Exchange				x			
16	CP	Modification Analysis & Specification, if contracted	Tyler staff conducts additional analysis and develops specifications	Specifications meet Client requirements						
17	D	Initial data conversion	Data conversion program complete; deliver converted data for review	Initial error log available for review						
18	D	Data conversion verification document	Provide self-guided instructions to verify specific data components in Tyler system	Client acknowledges data conversion delivery; Client completes data issues log.						
19	D	Installation of Modifications on the Client's server(s)	Program for Modification is complete and available in Tyler software	Client acknowledges Delivery of Modification(s) meeting objectives described in the Client-signed specification						
20	D	Standard Forms & Reports Delivered	Installation of all Standard Forms & Reports included in the Agreement	Client acknowledges that Standard Forms & Reports available in Tyler software for testing						
22	CP	Application configuration completed	Review of primary configuration areas	Configuration complete and ready for testing						

ID	TYPE	TITLE	SCOPE	ACCEPTANCE	ACCEPTED			REVIEWER	DATE	COMMENTS
				CRITERIA	Yes	No	N/A			
23	CP	Data conversions (except final pass) delivered	Subsequent passes of data conversions delivered and validated	Conversions are validated and ready for final pass						
24	CP	Standard 3rd party Data Exchange training provided	Use of standard data exchange tools is trained	Users have tools and have been trained						
25	D	Production Cutover checklist	Dates for final conversion, date(s) to cease system processing in Legacy System, date(s) for first processing in Tyler system, contingency plan for processing	Client acknowledges the checklist delivery including definition of all pre-production tasks, assignment of owners and establishment of due dates						
26	D	User Acceptance Test Plan	Testing steps for Standard business processes	Client acknowledges that Testing steps have been provided for Standard business processes						
27	CP	Modification(s) tested and accepted, if applicable	Client performs test of modification	Modification performs as outlined in specification						
28	CP	Standard 3rd party Data Exchange programs tested and accepted	Client performs test of 3rd party data exchange	3rd party data exchanges perform as expected						
29	CP	Standard Forms & Reports tested and accepted	Client performs test of Forms & Reports	Forms & Reports perform as expected						
30	CP	User acceptance testing completed	Client performs User Acceptance Testing using provided scripts or customized scripts	Client to determine						

ID	TYPE	TITLE	SCOPE	ACCEPTANCE	ACCEPTED			REVIEWER	DATE	COMMENTS
				CRITERIA	Yes	No	N/A			
31	CP	End User training completed	End User Training performed according to scope	End Users trained						
32	D	Final data conversion, if applicable	Final passes of all conversions completed in this Phase	Client acknowledges that data is available in production environment						
33	D	Support transition documents	Define support strategy for day-to-day processing, conference call with Client project manager(s) and Tyler Support team, define roles and responsibilities, define methods for contacting Support	Client acknowledges receipt of tools to contact Support and understands proper support procedures.						
34	CP	Final data conversion(s) delivered	Client provides final data extract and Reports from the Legacy System for data conversion and Tyler executes final data conversion, Client reviews final pass	Final pass is free of errors, or meets an acceptable level of error that may be fixed manually in Production						
35	CP	Transition to Tyler Support is completed	Tyler project manager(s) introduce the Client to the Tyler Support team	Call is completed						
36	CP	Post-live services have been scheduled, if applicable	Prior to scheduling services, the Tyler project manager(s) collaborate with Client project manager(s) to identify needs	Remaining services scheduled						

D – Deliverable

CP – Control Point