

# 15 Things Every Cutover Plan Must Consider

## (Going Live in Style Part 2)

Inspired by recent articles and thought leadership from #TeamNamos, I thought I would jump on the bandwagon and... lower the benchmark! Rather than try to speak with authority on items that my team are infinitely more qualified to comment on, I thought I would return to an article I posted a few years ago, 10 Tips to Cutover in Style.

<https://www.namosolutions.com/blog/cutover-10-tips-on-going-live-in-style/>

'Cutover in Style' is obviously somewhat of an oxymoron as it's still the top link on Google for that phrase! I'm not sure about a stylish cutover, however, it needn't ought to be a panicked cutover. In the last article I spoke about the preparation, phasing, rollback, and governance of cutover, in this article I will hone in on a checklist of key items your cutover plan must consider (IMHO!).

Strap yourself in, get caffeinated, and interrogate your project team to ensure Cutover planning has considered all the below:

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### 1. Communication of Change Freezes

In my experience there are five staggered phases of change freezes/chills, all of which should have communication tasks to ensure we have consulted and informed stakeholders:

**Operational** – this typical occurs on the tipping point of UAT, it's when you need to set expectations across your business that any discretionary operational changes are too high a risk to invalidate testing or derail the programme. So if your HR Director has plans of a reorg, your CFO has plans of wholesale cost centre changes, or your CEO wants to start trading in rupees or rubles... if it can wait until after go live, make sure it does. Good luck holding back the tide!

**Technical** – this is when the legacy systems you are Data Migrating from or the periphery systems you are integrating with must be baselined. Unless it is akin to an essential security patch, discretionary changes applied on these systems run the risk of invalidating your Data Migration dress rehearsal timings, or worse, driving unfeasible integration development that will not fit within your critical path. This typically occurs after your penultimate Data Migration.

**Configuration/Codebase** – this is essential to baselining your production build. It is the point at which PMs should say no to ANY changes. This typically occurs upon the test completion report of UAT. It requires discipline to hold this line, indeed, at Namos our internal change board will decline requests for change regardless of the commercial value at this point.

**Cutover** – this is the most obvious change freeze, it is when we remove access from legacy systems and force offline business continuity plans in as small a window as possible until we are live with the new system.

**Change Pipeline** – this is the often forgotten early life support change freeze, it is also the hardest to uphold as it is when

people feel the flood gates can open to all the 'parked' post go live items. In reality, you must enforce change governance to ensure you are stabilised before pushing discretionary enhancements. This typically occurs during HyperCare for at least a month (or three) after any major system change.

### 2. Environment Planning

Does your plan ensure you have at least one environment that is a clone of the production build you have just cutover with? If not, how can you perform root cause analysis of early defects and demonstrate that you can package and release fixes. Ideally you want two environments that mirror production so you can replicate and fix in one environment then practise a promotion of code/config for people to UAT before green lighting the release to production. If you are really showing off, your environment plan will also provide an anonymised training environment as well as preserving your original UAT environment for posterity and later auditing of your decision to go live. Don't forget to capture the dates of any patches or updates in the new system.

### 3. Deploy Steps Including Integrations

I remember a great Programme Manager repeatedly asking me what would happen if I was hit by a bus... to the point where I became paranoid when I crossed the road! However, her point was that there can be no single points of success in a cutover plan, any steps need to be documented in a way that a deputy (and a deputy's deputy) can read, rehearse and repeat. This is pivotal when we have dozens of integration end points.



#### **4. Baseline of Documents & Source Control Check Ins**

As with the above point, we need to lock down and baseline all the moving parts that form our production build and its documentation. Checking in to SharePoint and Source Control the last workbooks and source code (resp.) should be the legacy of the project and the foundations of the service that follows.

#### **5. Data Migration & Reconciliation**

I am not a fan of separating out Data Migration workbooks and the project plan, as the extracts from legacy should be triggered by final business activities and continuity (Point 6), the loads should trigger decommissioning steps and continuity (Points 7 and 8), and the reconciliation of the data load should drive phased user access (Point 11). If you really can't deal with a full Data Migration plan collapsed into your project plan, at least ensure you have every logical grouping of Data Migration objects with three tasks for extract & transform, load, and reconciliation, e.g. employees, suppliers, inventory, invoices et al.

#### **6. Final Business Activities in Legacy**

As with point 14 in your new system, the critical business dates within legacy systems should be captured in your cutover plan. These will drive when the data is considered 'static' and can be extracted before being locked down (see points 7 and 8). There are typically two tranches, activities that affect master data and those that are transactional. Master data would be the last dates you will accept changes

to your chart of accounts, banks, organisation structures, suppliers etc. Transactional changes will be the last dates you transact items such as expenses, joiners, leavers, payrolls, requisitions, orderings, receipting, supplier payments, BACS, period closes etc.

#### **7. Decommissioning & Access Revocation**

Decommissioning in terms of serving notice on legacy system suppliers may have predated the programme, however, these are the nails in the coffin steps! It is where you will decommission legacy integrations, suspend legacy reports, take final backups, redirect links, instigate archival plans, change firewalls, and revoke access and permissions.

#### **8. Business Continuity Measures**

So you've just lost your legacy systems... no problem, you've been rehearsing business continuity measures for months right? This is not just a case of a petty cash drawer! It's how you keep your business ticking for essential operations, e.g. how do you pay staff & suppliers in an emergency, how would you ensure a critical joiner is recognised as a staff member who can access systems. The steps to instigate and monitor business continuity should be in your cutover plan at least at a summary level. Remember that considerations must be made to ensure records can be captured securely in a way that allows for rekeying or loads into your new system.

### 9. Communications & Go/No Gos

As with my previous article, these should punctuate your cutover plan. The minimum should be two Go/No Go programme board decisions prior to final data migration, and before granting access.

### 10. Hypercare Support Provision

The cutover plan should show the steps to establishing your new support model, e.g. when will your service desk be able to log tickets, when will your FAQs/Intranet launch, when will you provide drop ins, who will be 'floor walking' etc.

### 11. Phased User Access

Assuming you are ready to support their inevitable issues, let's start granting access to your new system! The typical flow is to grant access to your support teams and implementors, then to the wider programme team, then to those involved in critical business activities, then to wider subject matter experts before finally opening the flood gates to self-service users.

### 12. Data Migration Dropout & Continuity Rekeying

Data Migration will unlikely be 100% and it is inevitable you will have things captured as part of business continuity, all of which will need to be rekeyed or loaded... this is your window. Make sure you allow for a window where your most

trusted subject matter experts can rekey/load this data. This record entry can be used as 'smoke tests'. Do not be tempted to perform 'penny tests' of dummy transactions in production.

### 13. Monitoring & Scheduling of Processes & Integrations

It tends to be unwise to put all your integrations and processes on a schedule right away. The best advice is to shepherd the first runs through so you can be assured they happen successfully and in sequence. Capture the first runs and scheduling in your cutover plans.

### 14. Critical Business Activities

Keeping a calendar of your first payroll runs, supplier payments, BACS payments, period close etc. will demonstrate confidence that the new system is performing to expectations. Signposting to these events also allows support teams to scale and stand down support personnel & measures.

### 15. HyperCare or Early Life Support End

So by this point you are up and running! Ensure there is a date where you know you will be evaluating acceptance criteria to formally accept the system into 'BAU' service... then plan the real go live party!

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If your PMs, Project Execs and Project Leads didn't flinch when quizzed on any of the above... you have a clean bill of health, what could go wrong!?

Namos have a track record for delivering successful Go Lives for projects of every scale from multi-national, multi-pillar, multi-million pound programmes right the way through to single applications for SMEs... and we're still learning! If you want to benefit from that learning, get in touch and we will be happy to show you how we can bring our experience to bear for your organisation.



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