

Bespoke software supplier transition plan

Use this checklist to plan a smooth transition when changing suppliers. Please edit and update to meet your specific project requirements.

Project details:

Date:

Current supplier name:

System to be migrated:

System interdependencies:

Planned date of migration:

Reason for migration:

Minimum new supplier capabilities:

Prospective new supplier name:

Project owner:

Project stakeholders:

□ Stage 1: Preparation phase:

1.1 Define the reason for transition:

Clearly state the reasons for changing suppliers and communicate them to relevant stakeholders.

1.2 Supplier evaluation:

Conduct a thorough evaluation of potential new suppliers, including cost, quality, case studies, capability, resources and capacity.

1.3 Supplier selection:

Select the new supplier(s) based on the evaluation and negotiations. Consider using a **SWOT** template to review the supplier and possible strengths weaknesses, opportunities and threats of each supplier, or create a matrix.

Matrix example:

	Company 1	Company 2	Company 3	Company 4	Company 5
Knowledge Transfer	£7,500	£15,500	£9,000	£10,000	£9,500
Retainer	£1,500	£3,000	£6,000	£2,500	£4,500
Support (4 days per month)	£3,000	£9,000	£4,500	£8,500	£6,000
24/7 Support	£6,500	£20,000	N/A	£18,500	£9,500
Metric					
Likeability	OK	None	Good	None	None
.NET experience	Good	None	Good	OK	Poor
Javascript experience	Good	None	OK	Poor	Poor
Team size	OK	Poor	OK	OK	OK
Availability	OK	Unknown	OK	Unknown	OK
Team location	Good	OK	Good	OK	Poor
Case studies	Good	OK	Good	OK	Poor
24/7 Support	Good	Poor	Good	OK	None
Support SLA	Good	Poor	OK	Poor	OK
Values	OK	None	OK	None	None
CSR	Good	None	None	None	None
Cyber Essentials +	No	No	Yes	No	Yes
ISO27001	Yes	No	Yes	No	No

1.4 Contract review:

Finalise contracts with the new supplier(s) and terminate the current supplier(s) contract if necessary. Consider: SLAs, and the term of the agreement? What resource and software capabilities are outlined?

1.5 Data and information gathering and sharing:

Collect all necessary data and information from your current supplier. Check with all stakeholders and check for any proprietary code and details that need specific handover protocols.

Stage 2: Transition planning:

2.1 Transition team:

Assemble a dedicated team responsible for overseeing the transition process.

2.2 Transition timeline:

Create a detailed timeline with milestones and deadlines for each transition phase.

2.3 Communication plan:

Develop a communication plan to inform all relevant stakeholders, including employees, customers, and suppliers.

2.4 Risk assessment:

Identify potential risks, consider industry regulations, standards and requirements and develop mitigation strategies - plan for a number of "What if" scenarios.

Stage 3: Execution phase:

3.1 Transfer:

Coordinate the transfer from the old supplier to the new supplier. Plan and test to ensure a smooth transfer.

3.2 Back out plan:

In the worst-case scenario you may need a back-out plan - Ensure a documented back-out plan is in place where the system can be reverted back to the original supplier.

3.3 Quality control:

Implement quality control measures at multiple points in the transfer process to ensure the new supplier meets quality standards and the transfer can be delivered.

3.4 Supplier training:

Provide training to the new supplier on your specific requirements and expectations, and support the new supplier to understand your team and your business.

3.5 IT systems integration:

Ensure that IT systems and data are integrated with the new supplier's systems.

3.6 Disaster recovery:

Plan for every scenario and ensure the new supplier has a proven disaster recovery policy in place ahead of migration.

Stage 4: Contractual transition:

4.1 Begin the process of terminating contracts with the old supplier and initiating contracts with the new supplier.

4.2 Monitor progress:

Agree regularly reviews and assess the progress of the transition against the agreed timeline.

Stage 5: Post-transition phase:

5.1 Performance evaluation:

Conduct post-transition performance evaluations to ensure the transition has been delivered as planned and that the internal team and supplier are working and collaborating effectively.

5.2 Feedback:

Gather feedback from your supplier and your team regarding the transition and address any issues. Log feedback and track any issues.

5.3 Documentation:

Ensure all transition-related documents, contracts, and records are properly filed and archived.

5.4 Continuous improvement:

Identify areas for improvement in the transition process and make necessary adjustments for future transitions.

Stage 6: Closure/ongoing management phase:

6.1 Final assessment of transition and move to BAU planning:

Review the overall success of the supplier transition project and document lessons learned, agree on any actions moving forward into BAU or the next scope of improvement.

6.2 Transition completion:

Officially close out the transition project and ensure all parties understand the new BAU arrangement, plan the handover of responsibilities to the appropriate teams/departments.

6.3 Stakeholder communication:

Notify all stakeholders that the transition is complete, provide any relevant updates, and inform them of the next stages of project management.

Additional notes and comments:

Remember to customise your plan and checklist to align with your specific requirements and consider industry regulations. Regularly update and revise it as needed to ensure its effectiveness for future supplier transitions.

Often a need to switch bespoke software suppliers arises when a business changes, improves or grows.

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