

# Project Management Partners Best Practices Summary

December 2024

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## Introduction

This report is produced annually under Section 153 of [Engrossed Substitute Senate Bill 5950](#) by Project Management Partners (PMPs) who provide expert-level project management to major state technology projects under oversight to help ensure successful outcomes. This report provides independent observations and recommendations for 2024, along with focus areas for 2025. The reporting period for this edition covers April - October 2024.

Technology projects often face significant challenges. Research from the Standish Group ([2022 CHAOS Report](#)) shows 37% to 66% of projects either fail or don't meet stated objectives. Similarly, [Gartner](#) estimates 55% to 75% of Enterprise Resource Planning (ERP) projects fall short of their goals. Washington Technology Solution's (WaTech) PMPs work with agencies to manage common challenges in IT projects including resources, contracts, vendors, budgets, schedule, incremental release cycles, and executive sponsorship.

WaTech oversight was created to ensure project success. PMPs are highly experienced professionals who partner with oversight consultants to help guide project to success throughout the project lifecycle. Best practices, deployment approach, business process engineering, human-centered design, and technical architecture are just some of the areas in which PMPs provide guidance and recommendations to project teams.

In 2024, Washington state had approximately 100 projects under oversight, spread across the following four project types according to project phases shown below:

Category	Implementation	Planning	Procurement	Total
Cloud Migration	6	4	0	10
Data Management & Analytics	11	7	0	18
Digital Services	21	21	4	46
Modernization	18	7	6	31
<b>Total</b>	<b>56</b>	<b>39</b>	<b>10</b>	<b>101</b>

Table 1 - 2024 Oversight Projects

## Executive Summary

One of the biggest reasons IT projects face delays is poor scheduling. According to the [Standish Group's 2022 CHAOS Report: Beyond Infinity](#), 59% of projects run late because of unrealistic deadlines, poor resource management, and a lack of visibility into task dependencies. This report focuses on three critical IT project best practices that have helped Washington state achieve better project outcomes over the past year. Each case study includes background and observation, impact of these challenges, the recommended "get to green" plan, and outcomes.

### 1. **Best Practice: Robust Test Planning**

A PMP independent review found that a legacy modernization project faced delays and issues because of poor test planning. Problems included unprepared test environments, understaffed test teams, and incomplete testing phases. With better test planning, these issues could have been avoided.

### 2. **Best Practice: Project Schedules**

A cloud migration project struggled to create and maintain a project schedule due to lack of experience. A PMP worked with the team to identify missing tasks and taught them the importance of a detailed and updated project schedule. The creation and maintenance of a robust project schedule helped the project to identify project risks and improved the team's coordination and ability to meet deadlines.

### 3. **Best Practice: Go-Live Readiness Planning**

A PMP played a key role in successfully deploying a SaaS solution for a large agency. By following WaTech's readiness steps and conducting an independent readiness review, the team ensured the system was prepared for launch, minimizing risks and disruptions.

These best practices highlight the value of careful planning, clear schedules, and readiness reviews in delivering successful IT projects. By following these proven strategies, Washington state can continue to improve its IT project outcomes.

# Robust Test Planning

## Background

A clear and detailed test plan is essential for successful implementation of software systems. A strong test plan should include the testing scope, test phases, use cases, required resources, processes, approach, dependencies, expected outcomes, and a timeline to ensure all components are thoroughly tested.

The following case study of a legacy modernization project in Washington state highlights how lack of detailed test planning led to significant delays and errors. Insights from both public and private sectors informed the independent analysis and recommendations provided.

## Observations

This project involved implementing a new software solution while integrating legacy systems across multiple agencies. Initially, the plan only included testing the new software. After discussions with the PMP, WaTech Oversight and external QA teams, the project expanded its scope to include upstream and downstream systems.

However, the two testing phases overlapped without clearly defined scope, resources, or time for agencies to prepare. The new software was still being configured, requiring urgent configuration decisions to complete remediation of the legacy systems. As a result, testing occurred while changes were ongoing, increasing risk.

Additionally, the project did not include a phase for validating the end-to-end functionality of all systems, which would have ensured that all components worked together seamlessly. Concerned about further delays, the project moved forward without resolving these critical issues.

## Impact

Proper test planning to ensure agency readiness involves testing the right components in the right order, often revisiting the same elements in different phases. Testing includes phases (e.g., system integration testing) and types (e.g., functional testing). While testing is often seen as a single activity, it involves multiple processes. As the Project Management Institute (PMI) emphasizes, even agile environments require disciplined test planning ([PMI, Disciplined Agile Test Planning, 2023](#)).

Key objectives for test phases should include:

- Verifying compatibility of system components with upstream and downstream elements.
- Verifying end-to-end functionality for systems and business processes.
- Collecting user feedback on business processes and system functionality.
- Ensuring systems can handle post-launch resource loads (e.g., user traffic, data processing).
- Clearly defining the scope, test types, and resources for each phase.
- Establishing a release management process for configuration and development changes.
- Allowing sufficient time for preparation, test case development, tester onboarding and training, test execution, and defect resolution.

Without detailed planning, projects risk delays and failure. Timing and interactions between test phases are critical. For example, end-to-end testing must follow the successful testing of individual components. In this instance, the primary concern and impact of improper test planning was agency readiness for the Workday implementation. Given the critical role that Workday plays in managing HR, finance, and operational processes, the impact of an agency not being ready for Workday implementation cannot be overstated.

In this case, the project launched simultaneous testing of the new solution's functionality and the legacy system integration without fully addressing gaps. This led to several issues:

- Key details were finalized on-the-fly, delaying progress and excluding critical participants.
- Test environments were unprepared, causing downtime and delays.
- Insufficient time was allocated for each testing phase, leading to incomplete testing and further delays.
- Critical systems and business processes were excluded from testing, increasing risks after deployment.
- End-to-end and regression testing were not possible due to limited scope and ongoing changes, leading to unidentified defects.
- Testers were pulled between testing new solutions and legacy systems, leaving key areas untested.

## Getting to Green

To address these issues, WaTech Oversight, PMPs, and leadership held in-person sessions with the project team to align on a “get to green” plan. These sessions focused on discussing testing approaches, lessons learned from other projects, and documented PMI guidelines ([PMI, How Do You Overcome Common Problems During Testing Phases?, 2019](#)). Experts provided tailored advice, and significant time was spent revising test plans and schedules.

Recommendations included:

- Adding an end-to-end testing phase after completing individual component testing.
- Ensuring all systems, data interfaces, and business processes were included in the test cases.
- Allocating sufficient time to gather test environments, test data, and resources.

## Outcome

Despite productive collaboration and detailed discussions on a revised approach, the project proceeded with its original testing plan. This decision extended the timeline for testing both the new solution configuration and upstream and downstream systems. These delays caused significant setbacks and required additional replanning of testing activities.

To address these challenges and improve outcomes in future projects, WaTech leadership, Oversight, and PMPs made the following key recommendations:

- Ensure test teams are staffed appropriately for the scale and complexity of testing activities.
- Allocate sufficient time for all testing phases, including test planning, test case development, test execution, and defect resolution.
- Allow additional time for setting up and maintaining test environments.
- Expand the scope of testing to include all impacted systems, interfaces, and business processes.
- Conduct comprehensive end-to-end testing using test cases that simulate complete business processes from start to finish.

These recommendations aimed to reduce risks, minimize delays, and improve the overall success of future implementations.

## Vendor Management

Effective vendor management is key to test planning, as listed in the [State Software Budgeting Handbook](#). Based on independent analysis, Washington state's vendor management practices as they relate to the testing phase of IT projects show strengths in:

- **Regular reviews:** Conducting regular reviews of the vendor's work products, including deliverable acceptance criteria, test plans, test cases, and test reports, to ensure quality and adherence to standards.
- **Performance monitoring:** Tracking key performance indicators (KPIs) to assess the vendor's performance and identify areas for improvement.
- **Risk assessment:** Continuously assessing potential risks and developing mitigation strategies to minimize their impact on the project.

Opportunities for improvement include:

- Proactive planning and agreement with vendor partners on the scope of testing and the discrete outcomes of each testing phase. This work should be accounted for in the vendor contract with enough flexibility to allow dynamic planning based on the actual work.
- Validation that the appropriate vendor staff participate in the planning and execution of testing.
- Clear ownership of the outcomes of each testing phase are defined early and strong partnership between the state and vendor is maintained in the planning and execution of each test phase.
- Procurement of independent verification and validation of test approach, plan, and results to ensure requirements (or design) work as designed and implemented.

These recommendations are in line with documented best practices by PMI ([PMI, Vendor Management Practices, 2024](#)) and McKinsey & Company ([McKinsey, 2024](#)).

## Public-Private Sector Comparison

The PMP's recommended approach to test planning aligns with industry standards, such as the Institute of Electrical and Electronics Engineers' (IEEE) [829 Standard for Software and System Test Documentation](#). This standard emphasizes the importance of well-planned,



executed, and documented end-to-end testing. The PMP's guidance also reflects the private sector's approach to test planning, as seen in practices employed by leading companies ([Deloitte, The Fifth Ingredient in a Word-Class Ethics and Compliance System: Testing and Monitoring, 2024](#)). For example, PMP recommendations to dedicate specialized teams to test planning and allocate adequate staffing and time for each phase mirrors strategies used by top tech organizations. These companies prioritize thorough end-to-end testing and design comprehensive test cases that simulate real-world business scenarios from start to finish.

Through independent analysis, the PMP determined that this project team's approach to test planning aligns with testing standards in states with large tech hubs, such as Texas. For instance, the [Texas Department of Information Resources' \(DIR\)](#) provides instructions and templates outlining recommended testing phases. Both the project in this case study and DIR implement testing practices inspired by the [Capability Maturity Model Integration \(CMMI\)](#), which supports structured approaches to requirements analysis, test case design, execution, and defect tracking.

While this project adheres to many industry standards, opportunities for improvement remain in key areas:

- **Comprehensive end-to-end testing:** Ensuring all systems and processes are tested as they function together in real-world scenarios.
- **Testing scope:** Including all impacted systems, interfaces, and business processes in testing activities.
- **Time allocation:** Allowing adequate time for establishing and maintaining test environments.

These recommendations are in line with industry-standard best practices listed in [IEEE 829](#), [CMMI](#), and [PMI](#). By addressing these areas, project teams throughout Washington state can enhance testing processes to better support successful project outcomes.

# Project Schedules

## Background

[PRINCE2](#) (Projects IN Controlled Environments), a project management methodology focused on project organization and control, emphasizes the importance of a well-defined project schedule in achieving success. According to [PRINCE2](#), an integrated project schedule is more than a progress-tracking tool - it is the foundation for effective project management. A properly maintained schedule ensures that all project elements are aligned, helping teams manage resources, track milestones, and identify risks early. Without it, teams often face confusion, resource misallocation, and inefficiencies that can derail a project.

Analysis of a cloud migration project study for a medium-sized Washington state agency, informed by public and private sector practice comparisons, illustrates how the absence of an integrated schedule affected the project, the steps taken to address the issue, and the positive outcomes achieved as the schedule was developed.

## Observations

The objective of the cloud migration project involved transitioning key legacy or mainframe systems to a cloud-based platform. Early analysis revealed that the project manager struggled to maintain a clear and structured project schedule. Informal conversations indicated that team members were overallocated, but the project plan did not capture this due to the lack of visibility into resource usage and task dependencies. This left the project manager unable to meaningfully assess workload distribution or estimate task timelines.

As bottlenecks and delays became frequent, the lack of a clear critical path or comprehensive schedule left the team without direction. The project schedule functioned more as a static task list, missing critical components such as task dependencies, resource allocations, measurable progress indicators, and milestones. Compounding the issue, the plan was not regularly updated, further obscuring risks and delaying progress.

Upon reviewing the schedule, the PMP and OC identified gaps that were creating inefficiencies and uncertainty. Without a detailed and robust project schedule, the team struggled to coordinate efforts, leading to duplicated work, missed tasks, and delays.

## Impact

The absence of a robust project schedule had significant consequences:

- **Delays and planning challenges:** The lack of meaningful resource allocation led to delays and made it challenging for the project manager to provide accurate updates on progress, risks, and resource issues to project leadership, the Oversight team, and other interested parties.
- **Decreased confidence:** Unclear timelines and frequent changes eroded confidence in the project team and its ability to meet deadlines.
- **Gate certification delays:** WaTech Oversight struggled to assess the overall project risk and health, which delayed the gate certification and approval process.
- **Uncoordinated efforts:** Dependencies between tasks were unmanaged, causing a domino effect of delays and rework.
- **Missed milestones:** Without milestones, deliverables were delayed, accountability weakened, and teams experienced confusion and frustration.

The PMP noted that the lack of a schedule management process limited the team's ability to identify and mitigate risks, leading to inefficiencies and misaligned priorities.

## Getting to Green

To address these challenges, the PMP and OC facilitated working sessions with the project team to develop a detailed project schedule. They helped identify missing components, such as task dependencies, approval cycles, and testing processes. By breaking down larger tasks into smaller, actionable parts, the team gained a clearer understanding of the project's scope and priorities.

One-on-one coaching with the project manager emphasized the importance of maintaining a robust project schedule via a schedule management process. The PMP demonstrated how a detailed project schedule could improve resource allocation, track progress, and manage risks. The team learned to adjust the schedule in real time to reflect changes in scope or timelines, ensuring it remained a valuable tool for guiding the project.

In addition, vendor collaboration played a key role in getting to green as illustrated below.

## Outcome

The production of a detailed project schedule brought significant improvements to the project team. The project manager, initially hesitant to commit to timelines, became more

confident in forecasting milestones and providing updates. Team members saw how their tasks fit into the larger project, fostering collaboration and alignment with project goals.

Rather than a fixed spreadsheet of tasks, the project schedule evolved into an automated tool that enabled the team to adjust the changes, identify potential risks, and allocate resources more effectively. Improved communication and visibility helped alleviate many of the issues that had previously hindered progress. While the schedule continues to evolve, it has provided the clarity and structure needed to keep the project on track and positioned the team for success.

## Vendor Management

In this case, vendor management also played a crucial role in addressing the challenges with the project schedule. PMI ([PMI, Vendor Management Practices, 2024](#)) emphasizes the importance of clear communication, well-defined roles, and risk management when coordinating with vendors to ensure project success. The PMP's independent analysis identified key strengths and areas for improvement in vendor management practices on this project:

### Strengths:

- **Communication with vendors:** Establishing regular communication channels and using shared project management tools helped drive visibility on project status and risk areas, as well as adherence to deliverable acceptance criteria as defined in the vendor contract.
- **Risk management:** Employing mechanisms to identify, track, and mitigate vendor-related risks.
- **Role clarity:** Clearly defining and documenting vendor roles and responsibilities.

### Opportunities for improvement:

- **Performance measurement framework:** Developing key performance indicators (KPIs) to measure vendor performance against defined responsibilities.
- **Stronger relationships:** Building trust through open communication and collaboration.

- **Monitoring and managing progress:** Continuously tracking vendor's progress against timelines, deliverables, and acceptance criteria and promptly addressing any issues.

These recommendations align with PMI ([PMI, Vendor Management Practices, 2024](#)) and McKinsey and Company's best practices ([McKinsey, 2024](#)). Incorporating them would strengthen collaboration between state agencies and vendors, ensuring that project schedules are accurate, comprehensive, and achievable.

## Public-Private Sector Comparison

This project team's approach to breaking down projects into smaller tasks, estimating durations, and identifying dependencies aligns with industry standards such as Project Management Institute (PMI) and Projects IN Controlled Environments (PRINCE2).

In keeping with private sector practices highlighted by McKinsey and Company ([McKinsey, Delivering Large-Scale IT Projects On Time, On Budget, and On Value, 2024](#)), this project team leveraged advanced project management tools to visualize timelines, track dependencies, and allocate resources efficiently. They also prioritized strong cross-functional collaboration to ensure accurate and realistic scheduling and implemented robust risk management practices to mitigate potential issues.

Through independent analysis, the PMP determined that the project team's approach to schedule development also aligns with public sector methodologies in other states. For example, the [Texas Department of Information Resources \(DIR\)](#) uses [PMI-based tools and templates](#) for project scheduling. Both DIR and the project team utilized scalable processes to standardize practices and achieve project success.

While most state agencies adhere to industry standards, opportunities for improvement include:

- Develop clear, structured and dynamic project schedules that are continuously adjusted to reflect the current state.
- Increase visibility into task dependencies and resource constraints.
- Enhance resource allocation to maximize productivity across project teams.

These recommendations align with [PRINCE2](#) and [PMI's](#) schedule development practices and provide actionable steps to further strengthen Washington state's project management outcomes.

# Go-Live Readiness Planning

## Background

Go-Live readiness is a proactive process that establishes clear, measurable criteria for a successful system deployment. It involves collaborative planning and ongoing monitoring to ensure all necessary conditions are met before transitioning to production. As highlighted by PMI ([PMI, What's on Your Go Live Project Checklist?, 2024](#)) and Deloitte ([Deloitte, Operation Go-Live: Mastering the People Side of Operational Readiness, 2024](#)), this process helps teams mitigate risks and ensure smooth deployments.

WaTech's Policy [PM-01-01-S](#) outlines the core components required for go-live readiness for projects under oversight:

- **Readiness criteria:** A comprehensive checklist covering areas like security, data integrity, user acceptance, and training.
- **Evaluation process:** Regular assessments to monitor the status of readiness criteria and communicate progress.
- **Go-Live readiness briefing:** A formal presentation for projects under oversight to review readiness and address any gaps or risks with go-live readiness.
- **Go/No-Go decision(s):** Final validation to determine whether the system is ready for deployment.

## Observations

This project involved implementing a SaaS solution to manage incidents and threats, ensuring the safety of employees and infrastructure on the capitol campus. Due to the program's critical role, it was categorized as high-risk and required a rigorous readiness process.

Initially, the team anticipated a straightforward implementation but soon realized the solution's flexibility introduced unexpected complexity. The PMP's independent analysis found the team had established readiness criteria two months before deployment. Approximately 25% of the criteria were complete, while others required new tasks to address overlooked areas.

Over four weeks, the PMP noted that two critical criteria remained *Not Ready*. The team

recommended delaying deployment by one month to focus on these areas. The first Go/No-Go meeting resulted in a No-Go due to concerns of one readiness criteria: Confidence to operate [confidential] functions and features. After additional testing and mock scenarios, the deployment proceeded two weeks later and was executed smoothly. All team members expressed confidence in the system's readiness.

## Impact

As Deloitte ([Deloitte, 2024](#)) emphasizes, readiness planning avoids the "one more thing" syndrome that can delay schedules and increase costs. Readiness does not demand perfection but focuses on identifying and mitigating risks early.

The PMP observed that the project team's readiness process:

- Significantly reduced risks associated with deployment.
- Avoided cost overruns, loss of credibility, staff stress common in chaotic deployments.
- Strengthened trust and confident among agency leadership and team members.
- Prevented worst-case outcomes, such as serious safety risks during incidents.

Their readiness process fostered transparency and distributed the go-live responsibility across the team. Challenges were resolved collectively, ensuring shared investment in both successes and lessons learned. The successful deployment also enhanced the reputations of individual team members. Overall, this project demonstrated a best-case scenario for go-live readiness. By following best practices, the team avoided common pitfalls, and the vendor's hyper-care support was ultimately unnecessary.

## Getting to Green

The project was led by a seasoned leadership team, including an executive sponsor, technology sponsor, and project manager. Their shared commitment to best practices created a positive team environment.

The PMP guided the team through WaTech's readiness process, helping them avoid pitfalls such as cost overruns, and strained vendor relationships. Key recommendations included:

- Ensure vendor support during go-live, with Service Level Agreements (SLAs) for timely responses.
- Establish a knowledge transfer and escalation process for critical issues.



These steps helped mitigate risks and ensured a seamless go-live transition.

## Outcome

The project team experienced the practical benefits of following best practices and plans to adopt these approaches for future endeavors. Critical to success was developing readiness criteria at least three months before go-live, objectively evaluating each criterion, and recognizing when certain elements required additional development.

## Vendor Management

PMI ([PMI, 2024](#)) highlights the importance of vendor management when preparing for go-live readiness. PMP analysis identified the following strengths in this project team's vendor management practices:

- **Roles and responsibilities:** Clear communication and shared readiness criteria with vendors.
- **Implementation support:** SLAs ensure timely vendor support during go-live.
- **Knowledge transfer:** Effective transfer of operations and maintenance (O&M) knowledge from vendors to agency teams.

Opportunities for improvement include:

- **Addressing bugs earlier:** Identify and resolve issues earlier rather than during go-live.
- **Contingency planning:** Prepare for unexpected challenges during deployment.

These recommendations are in line with PMI ([PMI, Vendor Management Practices, 2024](#)) and McKinsey and Company's ([McKinsey, 2024](#)) vendor management practices.

## Public-Private Sector Comparison

The PMP's analysis revealed alignment between the project team's go-live readiness approach and leading practices from PMI and Deloitte. Like PMI, the team's go-live briefings covered readiness criteria, readiness assessments, back-out contingency plans, and identified areas of concern. Deloitte's ([Deloitte, 2024](#)) emphasis on transparency and shared accountability was also evident in this project's readiness planning.

The team also adopted private-sector practices, such as leveraging go-live checklists and readiness components to ensure smooth deployments, consistent with Deloitte and Microsoft's ([Microsoft, Prepare to Go Live, 2024](#)) guidance. These practices included anticipating potential challenges and developing robust contingency plans.

Comparison with other states show alignment with methodologies like those used by the [Texas DIR](#) and [California Department of Technology](#)'s Project Management Office (PMO). Both states provide templates and checklists for readiness, similar to those listed in WaTech's policies and standards. Continuous benchmarking with these states ensures that Washington's processes stay current and effective.

Opportunities for improvement include:

- Preparing readiness criteria at least three months in advance of deployment.
- Following a robust readiness process to identify risks early.
- Developing stronger contingency plans for potential deployment issues.

These recommendations align with PMI ([PMI, 2024](#)) and Deloitte's ([Deloitte, 2024](#)) practices.

## Contact

Questions regarding this report can be directed to the PMP team at [watechdlprojectmgtpartners@watech.wa.gov](mailto:watechdlprojectmgtpartners@watech.wa.gov).

## Archived Reports

Prior reports are published on WaTech's website on the [Reports and Documents](#) page.

Prior videos and published material can be found on the [IT Project Resources page](#).

# Appendix A - Example readiness topics and criteria

## Readiness criteria

The Go-Live readiness process typically begins in earnest three to four months before go-live deployment. While it can be initiated earlier in the project lifecycle, a more detailed understanding of the project scope and requirements often becomes available around the project's midpoint. WaTech Policy [PM-01-01-S](#) Project Go-Live Readiness Decision Governance Standard outlines the minimum standards and requires that "Within 30 days after planning phase of project is completed, the project provides this information to [WaTech]."

While the specific criteria may vary based on the project, below is a list of common elements typically included in a go-live readiness assessment. Initially, the focus should be on high-level aspects of the project. As the project progresses, the criteria can become more granular to address specific details.

There is flexibility in managing, tracking, or presenting readiness criteria. The following graphic illustrates an example dashboard view of readiness criteria.

Shapes, Colors, and meanings			
Not Started 	In-Process 	Completed 	On target or ahead of plan, but not completed 
			Behind Plan (small risk to Go-Live) 
			Behind plan (no risk to Go-Live) 
			Behind Plan (severe Risk to Go-Live) 
Organizational / Staff Readiness	External	Solution	Data and Information Services Readiness
Communication Plan Complete 3/4/2020	CPA Announcements 12/10/2020	Security Design Review Complete 1/20/2020	Field Mapping Complete 1/22/2021
Rollback Plan Complete 3/4/2020	UBI Verification 12/31/2020	SAW/Active Directory/Salesforce Authentication 7/2020	Data Cleanup Rules/Logic Complete 1/2021
Stakeholder Plan 3/4/2020	WAMAS 12/31/2020	Test Plan Complete 7/2020	Migrate Data to Test 2/7/2021
Training Plan Complete 6/30/2020	NASBA 1/8/2021	Testing Environment Running 7/2020	Verify Test Data Migration 2/26/2021
Deployment Plan Complete 11/11/2020	Data.wa.gov 1/25/2021	Production Environment Running 7/2020	Go/No-Go to PROD 3/24/2021
Training Schedule Complete 11/11/2020	PayeeZ 2/12/2021	Data Testing Environment Running 12/2020	Migrate Data to PROD 3/27/2021
Staff Training 3/19/2021	Website updates 3/24/2021	User Acceptance Testing (UI) 2/23/2021	Verify PROD Data and UI 3/30/2021
Stabilization Plan 3/1/2021		Change Order Build Freeze 3/12/2021	Verify PROD Integrations 3/30/2021
Documentation 3/31/2021		Change Order User Acceptance Testing 3/11/2021	

Figure 1 - Readiness Criteria Dashboard

## Go-Live Readiness Briefing

A Readiness Briefing must be conducted prior to go-live, as per [Standard 121.10](#). This briefing should be conducted approximately a month before the first go/no-go decision, and at least before the final go/no-go decision.

At a minimum, these criteria must measure the readiness of technology, data, internal and external users, and supporting organization processes. It is common for some criteria to not be ready at the time of the briefing. For any criteria that are not yet met, the briefing should provide a clear explanation and outline the specific actions that will be taken to ensure readiness by the go/no-go decision time.

## Go-Live Readiness Criteria

Below are example go-live readiness criteria that can be tailored to meet individual project needs.

### Data

- Are the required and crucial data elements defined?
- Are data migrations script(s) complete, tested, and accepted?
- What is the back-up data plan?

### Security/Authentication

- Has a Security Design Review (SDR) with Office of Cybersecurity (OCS) been conducted and the project received approval to proceed?
- Is Active Directory authentication established, and access confirmed (in all environments including production)?
- Is Secure Access Washington (SAW) established, and access confirmed in all environments, including production?

### User-Acceptance Testing

- Have the mandatory requirements and/or minimum viable product (MVP) elements been fully addressed and signed-off according to plan?
- Are requirements or user-stories not addressed documented in preparation for future updates?
- Have all mock scenarios been tested and accepted?

### Configuration

- Is the solution sufficiently configured to provide functions and features needed to conduct business?

### Accessibility

- Does the solution meet accessibility requirements in the contract, as per [USER-01](#)?
- If the solution doesn't meet all state requirements on accessibility, is there a remediation plan to address missing requirements and consideration for a policy waiver?

### Help Desk & Operations

- Does Help Desk understand its role and is prepared with materials?
- Will subject matter experts and solution experts be fully available for hyper-care?
- Is the Tier 1 and 2 support process understood and documented?

### Planning Documents

- Is the Deployment plan complete and ready?
- Is the Rollback plan complete and ready?
- Is user instruction documentation (e.g. job sheets, user guides, etc.) ready?

### Communications & Interested Parties

- Was the Communications agency contacted and informed of the upcoming deployment?
- Do we need a Communication Plan and if so, is it complete?
- Are interested parties sufficiently informed of changes, do they know what to expect and what actions they need to take?
- Have all affected interests been informed of a tentative black-out period? (Note: *The final black-out period is communicated after a Go decision.*)

### Training & Support

- Have the primary users received training, and do they feel sufficiently prepared?
- Is there a training plan for new users?
- Do users know where to seek assistance?