

Transition Briefing and Handover of Management and Service Operations

(Vendor or Shared Services Organization Transitioning a new Customer – Internal Briefing and Handover to Operations)

Document Objective

This document provides a detailed overview of briefing the stakeholders (“Briefing”) and handing over the newly acquired services to the operational teams (“Handover”).

Briefing is a precursor to the planning sessions which determine the execution schedules for the customer transfer.

Briefing

Purpose

Briefing aims to inform the stakeholders of the impending transfer of the approved services from the customer organization to the Vendor. Specifically, the targeted stakeholders are:

- Executive Management,
- Senior Management Team (SMT), and
- Team leaders (TL) and the specific teams affected by the customer transfer.

Scope

The scope of the Briefing is determined by its intended audience and the expected timeframe for the customer transfer. For customer transfer occurring over a longer period (months), multiple briefings may be provided to update the audience on the progress and any variations.

For Executives, the briefing emphasis is to be maintained at a summary level indicating the accomplishment and/or progress with respect to a planned customer on boarding together with a broad outline of scope, proposed schedule and associated key milestones and exception handling arrangements.

For the SMT, the briefing will cover all the topics included in the Executive Briefing. In addition, the SMT must be informed about:

- The specific services as per the Business and Technical Services Catalogues,
- The affected Operational Teams and the nominated team leaders implementing the transition,
- High level activity list of the proposed schedule to be used as an input to detailed integration planning workshops,
- Key risks and risk management requirements including any fallback arrangements required and associated roles and responsibilities.