cutoverconcepts

Roles and responsibilities.

Version 0.18

Contribute your lessons at https://cutoverconcepts.org/

Contents

Introduction

Cutover Concepts outlines several key roles, while leaving flexibility in the specific responsibilities for task and artefact management. This enables the adaptation of Cutover Concepts for a variety of technologies and teams.

Heads of function and capability

These individuals are responsible for the customer organisation's operations, data, and personnel. They are senior managers who approve what the solution is, and how and when it is implemented.

They own:

- Approvals
- Overall accountability
- The budget
- Business outcomes

Typical functions and capabilities are:

- Architecture
- Change and Transformation
- Corporate and Social Responsibility
- Customer Success (can be in-house or supplier)
- Data and Analytics
- Finance
- Human Resources / Human Capital Management
- IT Services
- Operations
- Procurement
- Sales and Marketing
- Security Risk and Compliance
- Technical Delivery

Functional and capability leads

Each function and capability will often have day-to-day team leadership responsibilities. They will be familiar with the organisation's people, technology, processes, and business. They report to their respective Head of function or capability.

They own:

- Live proving scenarios
- Their area's runbooks
- Their areas readiness criteria
- Testing sign-off
- Validation of their data
- Availability of their team members

Programme manager

The Programme Manager is typically independent of the SI and often receives support from a PMO (Programme Management Office). This person steers and leads the programme towards cutover and beyond. They are the ultimate pragmatic driver, reporting to the organisation's board and liaising with other programmes and projects.

They own:

- The programme plan
- Board reports
- Contracts.
- Programme level RAID items
- Dependencies

Project manager

The Project Manager provides detailed financial management, risk management and mid-level planning. Also, this person manages resources and stakeholders on a day-to-day basis.

They own:

- Project plan(s)
- The RAID log,
- The resource plan
- The stakeholder map.

Customer success manager

This role is filled by a representative from a technology vendor or SI to guide a customer organisation through the vendor's implementation methodology. Usually, for medium-sized or larger implementations, a customer-side Cutover Manager is also needed. This is to prepare the organisation's people, data, systems and processes ready for cutover and to drive progress.

The Customer Success Manager owns:

- The tech vendor implementation methodology
- System Integrator resources

Solution architect

There are various types of architects depending on the team. The Solution architect produces the solution designs and engages with the organisation's architecture governance to agree on how to integrate the new system. If there are to be multiple transition states, these are designed by the Solution architect.

They own:

- Design authority setup
- Technical vision
- Business architecture
- High-level design
- Low-level design
- Legacy and reach-back design
- Data flows
- Data model and interfaces
- The design principles

Product lead

This person determines what the system must do for the customer and its users, as well as the sequence of functionality being delivered.

They own:

- Functionality
- Release roadmap
- User needs
- Requirements
- User journeys
- Their chosen product management discipline

Business change lead

This person ensures the readiness of business processes, role types, the user list, role mapping, user training, and programme communications, covering the overall people element.

They own:

- User list
- Role mapping
- Communications plan
- Training
- Business process changes
- Ways of working changes
- Business readiness criteria
- Usage telemetry

Technical lead

The Technical Lead provides leadership and direction on all matters relating to technology. This includes the selection of technologies and how the technology can be successfully implemented.

They own:

- Non-functional requirements
- Technical skills matrix
- Config/development practices

Delivery manager

The Delivery Manager oversees the system build, agreeing ways of working with the Test Lead and all teams to deliver the desired system ready for cutover.

They own:

- The delivery plan
- Workflow management setup
- Code and configuration management
- Code and configuration workbooks
- Delivery management tooling

Dev / config team

This team carry out the development or configuration of the new system. Depending on the team setup, they may include specialists from multiple organisations spanning the solution architecture.

They own:

- Code/config in the environments
- Coding documentation
- Configuration workbooks.

Integration lead

The Integration Lead, with the help of their team, will build the integrations needed to enable the new system and secure the previous. They will populate the integration runbook with steps to configure, enable and disable interfaces in the cutover.

They own:

- Integration specifications
- The integration runbook
- The integration build

Test lead

The Test Lead defines and agrees on how testing will be done to the satisfaction of the Functional and Capability Leads and manages its completion.

They must ensure role mapping is applied for testing to ensure correct permissions and access levels are used. Additionally, the Test Lead must create and populate the defect and workaround tracker during testing. The tracker should include the defect's impact and any associated manual workaround (if applicable), using input from the Functional and Capability Leads.

They own:

- The test strategy
- Test plans
- Defect and workaround tracker
- End of test report

Environments manager

The Environments Manager manages the build of environments to enable delivery, deployment and the ongoing service. This person will need to ensure that the build of each environment is documented to understand the specification and build steps for creating the production or supporting environments. This activity is also essential for understanding any differences between the production and non-production environments, as well as for predicting how the production environment will behave in live proving and early life.

They own:

- The environment strategy
- The environment model
- The environment plan
- Environment specifications
- Environment build plans
- Environment refresh

Data migration lead

The Data Migration Lead manages the Extract, Transform, Load (ETL) and reconciliation of data, from source to target systems. This includes non-production tuning cycles, rehearsals, and the cutover itself. Key duties include:

- Acquiring the necessary datasets for all ETL activities.
- Refining the ETL and reconciliation down to an acceptable time, to fit into the cutover window.
- Ensuring automation is utilised effectively in ETL and reconciliation to minimise effort, errors, and duration.
- Provision of reconciliation reports for each ETL tuning cycle, displaying data scope, data quality, data owners and duration of the migration.

They own:

- Data migration strategy
- ETL Logic
- Data objects to migrate
- Source list
- Data owner Table
- Data reconciliation reports
- Data cut-offs,
- Data protection documentation
- The migration environment

Cutover manager

The Cutover Manager orchestrates the move of technology, users, processes, and data into the production environment. They then trigger operations in the new solution to make it the live service. Responsibilities include:

- Creating the cutover strategy and agreeing on the cutover format.
- Leading a campaign to identify and prepare all parties.
- Setting and de-risking the go-live date with all parties.
- Agreeing on the rehearsal scope, entry and exit criteria for each deployment activity.
- Tracking readiness criteria towards the cutover entry call.
- Planning and managing cutover workshops, rehearsals, cutover and backout.
- Applying lessons to the detailed cutover plan.
- Setting up and coordinating entry and exit calls, including live proving to enable a 'go-decision'.
- Managing the cutover.

The Cutover Manager is typically independent and acts on behalf of the client.

They own:

- Deployment plan
- Cutover strategy
- Rehearsal scope
- Rehearsal and cutover entry/exit criteria
- Overarching readiness criteria
- Readiness report
- Cutover PoaP
- Runbook template
- Detailed cutover plan
- Backout plan and cutover sitrep.

Service transition lead

This person sets the criteria that must be met for the new solution to go-live, with particular focus on support, stability, and continuous improvement. They are the bridge between non-production and production build, the protector of production systems and the representative of IT Services.

They own:

- Service transition criteria
- Service transition plan
- Early life support model
- Early life entry/exit criteria
- Service and Support Model
- Knowledge transfer for support teams
- Knowledge articles
- ITSM (IT Service Management) platform setup
- Production change orders
- Change Approval Board (CAB) setup
- Support team impact analysis
- Support team skills matrix
- Up-skilling and resourcing plan
- Monitoring and alerting
- Disaster recovery arrangements
- Platform update model
- Daily / twice daily incident calls
- First occurrence monitoring results
- Early life exit criteria
- Early life exit call

Written by people, grammar checked with AI.