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## Overview

This sub-discipline covers the competencies required to plan and manage the effective installation, implementation and handover of an information technology system. It also includes the competencies required to ensure that post implementation review activities take place.

Planning of installation, implementation and handover activities may commence at an early point in the lifecycle, in some cases running in parallel with analysis, design and development activities. In the case of information technology systems, services and assets that require implementation on a national or global scale, many of the activities relating to education and training will commence well in advance of any planned implementation date(s). In some organisations, installation, implementation and handover may be initiated as part of wider change management activities within an organisation.

## Performance criteria

*You must be able to:*

### Plan and prepare for systems installation, implementation and handover

- P1 Implement and maintain policies and standards relating to systems installation, implementation and handover activities
- P2 Correctly implement and maintain systems installation, implementation and handover procedures, tools and techniques in line with organisational standards
- P3 Apply best practice to systems installation, implementation and handover activities within own area of accountability
- P4 Identify all internal and external sponsors of and stakeholders for systems installation, implementation and handover activities
- P5 Negotiate and agree handover arrangements and timescales with relevant system user and support managers
- P6 Evaluate all information gathered during systems installation, implementation and handover activities in order to identify lessons for future activities

### Manage systems installation, implementation and handover

*You must be able to:*

- P7 Ensure that all resources required for installation, implementation and handover are available on schedule
- P8 Verify the accuracy, currency, completeness and relevance of information collected, used, produced and documented as part of systems installation, implementation and handover activities
- P9 Co-ordinate systems installation, implementation and handover activities with other solution development and implementation activities
- P10 Manage effectively changes to business requirements through change control mechanisms during systems installation, implementation and handover activities
- P11 Monitor systems installation, implementation and handover activities to ensure effectiveness, quality, progress and compliance with all legislation, regulations and standards
- P12 Select and take appropriate and timely action in the event of the deliverables of systems installation, implementation and handover being incorrect, incomplete or inadequate
- P13 Take appropriate and timely action in the event of systems installation, implementation and handover deliverables not supporting the business needs
- P14 Ensure that service management, systems integrity, security and disaster recovery requirements are met during systems installation, implementation and handover activities within own area of accountability

### Manage external relationships during systems installation, implementation and handover

*You must be able to:*

- P15 Communicate effectively and in a timely manner with sponsors, stakeholders and external bodies on all relevant aspects of systems installation, implementation and handover activities
- P16 Manage relationships effectively with sponsors, stakeholders and external bodies on matters relating to systems installation, implementation and handover activities
- P17 Manage relationships effectively with external providers of systems installation,

- implementation and handover services
- P18 Present and report findings, recommendations and issues arising from systems installation, implementation and handover activities accurately, clearly and in a timely manner.

## Knowledge and understanding

*You need to know and understand:*

### Plan and prepare for systems installation, implementation and handover

- K1 the systems lifecycle as it relates to systems installation, implementation and handover activities
- K2 the importance of systems installation, implementation and handover activities on the full life cycle of information within an organisation
- K3 the procedures, tools and techniques that can be used to monitor systems installation, implementation and handover activities:
  - K3.1 for effectiveness and quality
  - K3.2 for compliance with legislation, regulations and standards
- K4 the need for rigorous and detailed planning and monitoring of systems installation, implementation and handover activities
- K5 external factors and their implications on systems installation, implementation and handover work
- K6 the systems, services and assets and associated business processes that need to be implemented as part of systems installation, implementation and handover activities
- K7 the need for planning of systems installation, implementation and handover activities to commence at an early stage in the systems lifecycle and/or a project or programme, and may be initiated as part of change management
- K8 the fact that environments need to be created and managed for use during systems installation, implementation and handover activities
- K9 the availability and capability of external providers of systems installation, implementation and handover services and that there are disadvantages and benefits of using them
- K10 the critical impact of systems installation, implementation and handover activities on the success of business change, projects and programmes
- K11 the high degree of disruption and risk which can be associated with systems installation, implementation and handover activities
- K12 who needs to:
  - K12.1 be involved in the planning, scheduling and execution of any systems installation, implementation and handover activities
  - K12.2 sign off any systems installation, implementation and handover activities
- K13 the importance of negotiating and agreeing handover arrangements and timescales for the information technology system with those responsible for managing the operational running and service levels of it, during systems installation, implementation and handover activities to minimise disruption
- K14 the importance of agreeing and scheduling post implementation reviews following systems installation, implementation and handover activities
- K15 documenting lessons learned from conducting post implementation reviews
- K16 select who should be involved in the planning and scheduling of systems installation, implementation and handover activities
- K17 identify issues associated with systems installation, implementation and handover activities
- K18 use and apply:
  - K18.1 the most appropriate approaches to systems installation,

- implementation and Handover
- K18.2 best practice in systems installation, implementation and handover activities
- K18.3 lesson learned from prior systems installation, implementation and handover assignments
- K19 implement and maintain the procedures, tools and techniques for conducting and monitoring systems installation, implementation and handover activities
- K20 negotiate with those responsible for managing the operational running and service levels of any IT/technology system and agree handover arrangements and timescales
- K21 schedule, conduct and document post implementation reviews

**Manage systems installation, implementation and handover**

*You need to know and understand:*

- K22 the relationship between business change management, testing, systems integration and systems installation, implementation and handover activities
- K23 potential implications to an organisation of systems installation, implementation and handover deliverables not meeting the business needs
- K24 potential implications of failings of integrity, confidentiality and information security during systems installation, implementation and handover activities
- K25 the need for, and importance of, monitoring systems installation, implementation and handover activities:
  - K25.1 for progress of against plans and schedules
  - K25.2 for effectiveness and quality
  - K25.3 for alignment with all relevant legislation, regulations and standards
- K26 the importance of :
  - K26.1 ensuring co-ordination between systems installation, implementation and handover activities and securing sign off of the system from sponsors, stakeholders and users prior to handover
  - K26.2 managing changes to business requirements through change control mechanisms during systems installation, implementation and handover activities
  - K26.3 establishing progress checkpoints and decision points to inform decisions during systems installation, implementation and handover activities
  - K26.4 ensuring that service management requirements for the operational system will be met during systems installation, implementation and handover activities
  - K26.5 documenting the deliverables from systems installation, implementation and handover work in a clear and understandable manner
  - K26.6 verifying the accuracy, currency, completeness and relevance of data and information used by/for systems installation, implementation and handover activities
  - K26.7 defining and using back out criteria, plans and procedures as part of systems installation, implementation and handover activities
  - K26.8 referencing systems design and service management deliverables that specify precisely how any IT/technology system should operate and be

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- used during systems installation, implementation and handover activities
  - K27 develop and use plans (including back out criteria and procedures where appropriate) to manage systems installation, implementation and handover activities based on relevant information
  - K28 verify and analyse information gathered for and during systems installation, implementation and handover activities in order to inform decision making and action
  - K29 use and apply the procedures, tools and techniques to conduct and monitor systems installation, implementation and handover activities
  - K30 ensure the implementation and handover of all required business processes, systems, services and assets
  - K31 manage, during systems installation, implementation and handover activities:
    - K31.1 availability of resources
    - K31.2 changes to business requirements through change control mechanisms
    - K31.3 alignment with all relevant legislation, regulations and standards
    - K31.4 alignment with any related organisational design/redesign and/or business change
    - K31.5 external factors
    - K31.6 the provision of training, documentation and support materials to users and support staff involved with an IT/technology system and its associated business processes
  - K32 analyse and interpret the results gained from monitoring systems installation, implementation and handover activities
  - K33 select and take actions:
    - K33.1 to reference systems design and service management deliverables that specify precisely how the information technology system should operate and be used during systems installation, implementation and handover activities
    - K33.2 to ensure systems installation, implementation and handover activities are integrated into projects and programmes
    - K33.3 to take account of external factors in systems installation, implementation and handover activities
    - K33.4 as a result of decisions made by sponsors, stakeholders and external bodies during systems installation, implementation and handover activities
    - K33.5 to secure sign off of systems installation, implementation and handover activities by sponsors and stakeholders
    - K33.6 in the event of breaches in the security and integrity during business process design/redesign and improvement assignments
    - K33.7 in the event of systems installation, implementation and handover activities failing and/or not supporting the business needs
  - K34 identify and use business criteria to set progress checkpoints and decision points
  - K35 to ensure that disruption to business operations is minimised during systems implementation and handover activities

**Manage external relationships during systems installation, implementation and handover**

*You need to know and understand:*

- K36 the importance of:
  - K36.1 communicating effectively and in a timely manner with sponsors, stakeholders and external bodies during systems installation, implementation and handover activities, particularly in relation to progress, decisions required and timescales
  - K36.2 managing relationships with sponsors, stakeholders and external bodies on matters relating to installation, implementation and handover activities
  - K36.3 presenting information produced by systems installation, implementation and handover activities, particularly information relating to how the proposed information technology solution will function, in an understandable form to a wide range of sponsors, stakeholders and other individuals, in order to confirm understanding and ensure needs are being met
- K37 the need to monitor the effectiveness and quality of external providers of systems installation, implementation and handover services
- K38 report on:
  - K38.1 issues arising from monitoring systems installation, implementation and handover activities against plans and schedules
  - K38.2 the progress of systems installation, implementation and handover activities to sponsors, stakeholders and other individuals
- K39 establish and manage effective relationships with
  - K39.1 sponsors, stakeholders and external bodies
  - K39.2 external providers
- K40 communicate:
  - K40.1 effectively and in a timely manner with sponsors, stakeholders and external bodies on all aspects of systems installation, implementation and handover activities
  - K40.2 the progress of systems installation, implementation and handover activities against plans to sponsors, stakeholders and other individuals involved in and impacted by them

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IT/technology systems installation, implementation and handover Level 5 Role

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