



In-flight Project Transition Process Framework: Step by Step approach

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ABSTRACT

Transition and change are integral to both personal growth and organizational development, signifying the movement from a current state to a desired future state. In-flight project transition, the process of shifting project leadership, team composition, or strategic direction while a project is ongoing. Successful in-flight project transitions contribute to the overall resilience and agility of the organization, enabling it to navigate uncertainties and capitalize on new opportunities more effectively. This agility is crucial in today's fast-paced and constantly changing business landscapes, making in-flight project transition a key competency in effective project management. This research paper explores a simple 5 step process to transition in-flight projects successfully. The new business dynamics and agile management are helping these transitions more effectively. However, many of such in-flight transitions are highly complicated due to the aggressive time-to-market window. Despite the process, the success of these projects highly depends on the Project manager's skill to adapt to the change quickly, quick learning, and ability to tackle the uncertainties. 85% of the project managers manage more than one project, in-flight project transition may create challenges and impact on the overall productivity of the project managers. So, its utmost importance that every organization should have an in-flight transition framework as a part of the PMO framework.

Key words: Project Management, Inflight Projects, Project Transition, Framework,

INTRODUCTION

Project transition occurs when a project or a phase within it shifts from one team or phase to another, ensuring continuity, efficiency, and the successful realization of objectives. This process is necessary to adapt to changing business environments, leverage new expertise, or address shifts in strategic direction. Transitioning in-flight projects successfully requires meticulous planning, clear communication, and the transfer of knowledge, ensuring that the incoming team is fully equipped to move forward without loss of momentum or direction. Effectively managed transitions can lead to improved project performance, reduced risks, and enhanced stakeholder satisfaction by ensuring that projects remain on track, within budget, and aligned with the overarching strategic objectives of the organization.

Firstly, it ensures the continuity of project activities, minimizing disruptions to the project timeline and maintaining momentum towards achieving project goals. Effective transition strategies are essential for preserving institutional knowledge and ensuring that new team members or leaders are fully informed about project objectives, status, and challenges.

Secondly, transitions can introduce fresh perspectives and expertise, potentially improving project outcomes through innovative solutions and approaches. This infusion of new ideas can enhance problem-solving and decision-making processes, leading to more efficient and effective project execution.

Thirdly, in-flight transitions facilitate the alignment of the project with evolving organizational strategies and external environments. As business needs change, projects may need to pivot to remain relevant and deliver value. A well-managed transition allows for these adjustments without derailing the project.

Moreover, transitions help in managing stakeholder expectations and engagement by demonstrating adaptability and responsiveness to feedback and changing conditions. This can improve stakeholder trust and support for the project.

This paper explains the in-flight project transition framework and in-depth process (Step by step) of in-flight project transition.

THE FRAMEWORK

A framework is essentially a set of tools, libraries, conventions, and best practices designed to facilitate the development of models. The In-flight project transition framework consists of various components but the most important is a step-by-step approach to understand and implement the project transition. The focus of this paper is to discuss the actual transition process, its phases, tools, and templates required, involved participants, and best practices.

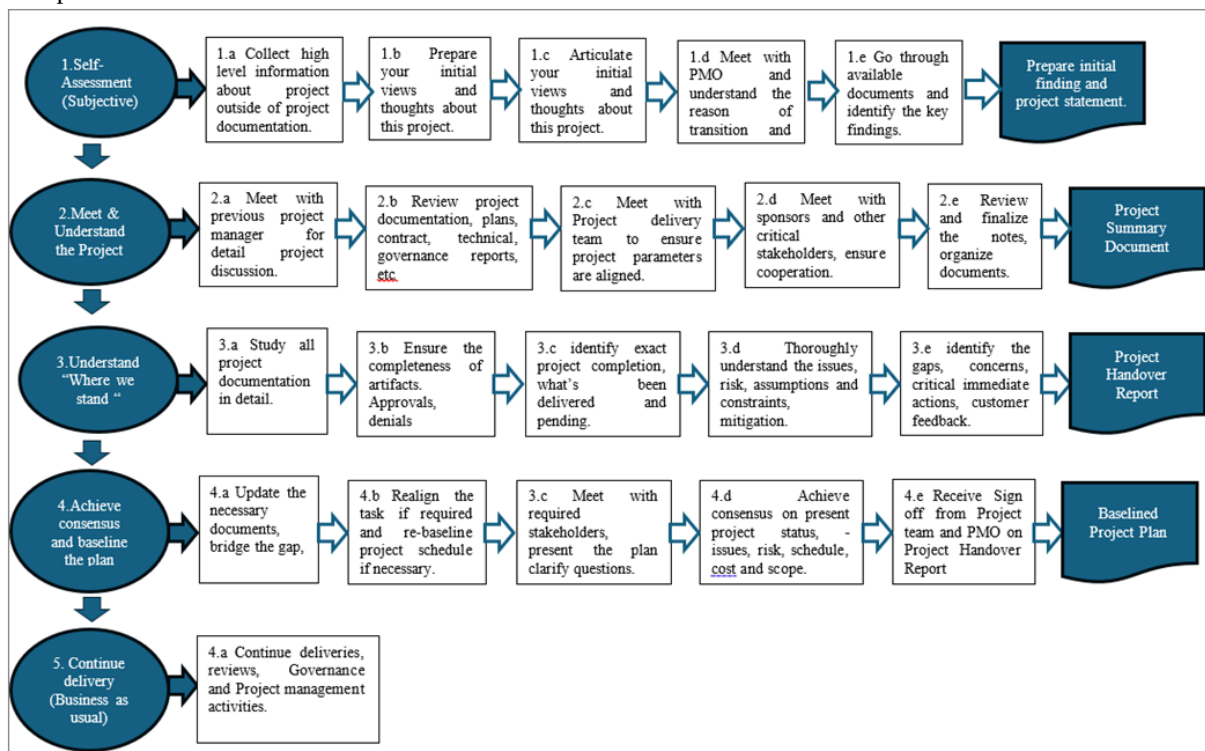


Figure 1: In-flight project handover process workflow. Source: Author

Targeted Stakeholders

One of the goals of such project transitions is to execute the task without distracting other teams or groups.

1. PMO (if applicable) – PMO upholds the priority and execution of the projects. PMO works with Business stakeholders to decide the transition needs.
2. Project Managers – Involve both project Managers who is passing the charge and who is taking the handover.
3. Business team / Delivery Team and other support groups: These groups can be involved as and when they are required.

Tools and Templates

This framework expects the following minimum necessary tools or templates. These tools or templates are outside of the project documents that the Project Manager will manage along with project documentation.

1. Self-Assessment Document: This template is designed to record the initial assessment notes. These are rough notes that help the project manager to initiate initial dialog with stakeholders. This is also an

important tool to assess the Project Manager's confidence in his/her understanding of the targeted project before the actual transition starts.

2. Project Summary Document – This is a summarized document a project manager will prepare after his/her initial understanding of the project. This document will have a summary of each aspect /component of the project plan. The reason for having this document at the summary level is to accelerate the transition process without emphasizing too much on documentation while critical transformation and bring agility to the whole process.
3. Project Hand Over document: This is again a summary of the above two documents and depicts the status quo of the project at the time being handed over. This document also indicates the gaps, challenges, pain points, and current path to proceed with this project. It may have references to the already existing documents to explain the status of the handover at a glance. This is mostly an indicative document and authorization for a Project manager to proceed further on the project.
4. Baselined Project Plan: This is an existing project plan document; it may consist of several plans that might need adjustment and revised project actionable.

The Transition Process

The project transition process involves the systematic handover of project deliverables, knowledge, and responsibilities from the project team to the operational teams or end users, ensuring continuity and operational efficiency. This process includes detailed documentation, training sessions for the receiving team, and the transfer of relevant information and resources. Effective communication and planning are critical throughout, ensuring that all parties are informed and prepared for the transition. The goal is to facilitate a seamless shift to business-as-usual activities, maintaining the integrity and effectiveness of the project outcomes.

1. Self-Assessment: This phase is the initial phase of the overall transition process. In this process, the Project Manager tries to collect all available information about the project through available documentation, informal meetings, casual conversations, available status reports, customer feedback, public statements, press releases, etc. This is not necessarily the formal start of the transition process. This phase is very critical as the Project Manager tries to understand the project outside of the project environment and without any structured approach. The goal of the Project manager is to make himself/herself aware of the high-level facts of the project. This will also help the Project manager to prepare the ground for further conversations and meetings. After a high-level understanding of the project, the Project manager had a conversation with the PMO for a deeper understanding of the rationale behind the transition and organizational expectations. Also understand the key blockers, project dynamics, stakeholders, personalities, possible challenges, etc. With this information, the Project Manager prepares the initial understanding of the project and notes key findings. These key findings should be clear enough for a project manager to plan the next action and path forward. E.g. prioritization of transition tasks, getting key people on the calendar, preparing a list of all vendors, suppliers, outside project contributors, key documents, and their versions, what information is required from the previous project manager etc.
2. Meet and understand the Project: This is where the formal transition kicks off. The prerequisite for this phase is the previous phase, a project manager should have a high-level understanding of the project so that he/she can initiate the formal meeting with stakeholders. A Project Manager should have a bare minimum understanding of the projects to start transition conversations. The collected fact and project understanding is briefly discussed with the previous Project manager. Through intense discussions, all documents, reports, repositories, plans, and contracts are reviewed with the project manager, gap and impact are prepared, critical challenges are called out, ensure the completeness of documentation and status is updated correctly, risk and issues are updated, and mitigation plan is documented, etc. The project manager introduces himself/herself to the team, meets with the delivery team, establishes relationships and communication with various delivery teams, sets expectations, ensures openness in conversation, welcomes gestures, builds the team's confidence, and motivates them, ensuring easy access to them. After gaining enough details about the project and project teams, the Project manager meets with business stakeholders and sponsors. This rarely happens in small projects but for complex, large-scale project demands, the project manager should gain sponsors' confidence and ensure them

smooth transition. This is an opportunity for the Project Manager to understand the vision of the projects and bridge the gap if any with sponsors. After the fruitful meetings, conversations, and documentation reviews, the Project manager is now ready to proceed to the next step.

3. Understand “Where we stand”: It is of utmost importance for project managers to gain as much project understanding from the previous phase to assess the project quantitatively in this phase. In this phase, the project transition moves from subjective to objective, and qualitative to quantitative discussions. The project Manager spent a substantial amount of time trying to understand the various constraints and project parameters like scope, timeline, cost, and quality. Review all approvals and denials, change requests, risks, issues, risk responses, contract obligations, delivery metrics, SLAs, and KPIs. Identify what has been delivered and what is in queue, understand the priority, MVP, regulations, SLA breach, contract breach, and schedule slippage, understand the planned value, actual value, earned value, cost variance, schedule variance, forecasting, estimate at completion, estimate to complete, variance at completion., assumptions, limitations, corrective actions, RTG-returns to green plan (if any), customer satisfaction, requirement stability, requirement creep, gold plating, defect metrics if anything already deployed. These details will help the project manager with the current state of the project and how it's been doing in the past. How this project learned from past mistakes, and what corrective action was taken to strengthen project health. Along with the current state, the Project Manager also prepares the gaps, suggestions, and path forward, and strategizes the project management task. After a thorough study, the project manager prepares the Handover document that documents the current state of the project. This document needs formal approval from the PMO to conclude the project transition execution. However, this document will be reviewed and signed in the next phase.
4. Achieve Consensus and baseline the plan: This is the last phase of the transition activity. The Handover document prepared in the previous phase is reviewed with selected stakeholders and authorities and presented for joint review. The document can go through several repetitions to accommodate the changes and suggestions. In addition to seeking approval of this document, the Project manager realigns the management task (not WBS) after discussion with the project teams. Baseline the plan so that it can start measuring the changes and deltas after the handover. The goal of this phase is to achieve consensus on the handover document to ensure transparency and effective transition.
5. Continue Delivery – After the successful transition, the project manager continues to focus on delivering the project objectives. The mission-critical projects are complex, large-scale, and impactful. In such a project environment, “In-flight Project Transition” is itself spawned as a separate project.

Each step has multiple tasks and a sequence of activities. Each step produces some outcome and deliverable. The cascade effect and dependency of the previous step to the next step ensure the integrity of the process and apply checks and balances to ensure the effectiveness and completeness of the whole process.

Measuring the success of transition:

However, the success of the inflight project transition can be measured in two ways.

1. How effectively has the transition been made? The transition should not interrupt the current project execution, nor should it adversely impact project objectives.
2. The project's end result after implementation- This tells how effectively the transition has been made. The post-project implementation should not raise any question on the effectiveness of transition in case of project failure.

THE CRITICALITY OF THE TRANSITION

In-flight project transition is critical for several reasons, each impacting the project's continuity, effectiveness, and alignment with strategic goals:

Maintains Momentum

Transition during a project ensures that changes in team composition, leadership, or direction don't halt progress. It helps maintain the project's momentum by ensuring new members or leaders are quickly brought up to speed.

Ensures Continuity

Critical for managing the seamless continuation of project activities, in-flight transition minimizes disruptions, ensuring that ongoing tasks and responsibilities are not left unattended during the changeover.

Adapts to Change

Projects may need to adapt to new business strategies, technologies, or market conditions. Effective transition processes allow projects to remain flexible and responsive to these changes without compromising on deliverables.

Risk Mitigation

A well-managed transition reduces the risks associated with personnel changes, including the loss of key project knowledge and expertise. By ensuring knowledge is transferred and documented, the project is safeguarded against potential setbacks.

Stakeholder Confidence

Successfully managing in-flight transitions can enhance stakeholder trust and confidence in the project management team's ability to handle challenges and changes, thereby supporting the overall project's credibility and reputation.

Quality and Outcomes

Effective transition strategies ensure that the quality of work and the achievement of project outcomes are not compromised by changes within the project environment. This is critical for delivering value and meeting or exceeding stakeholder expectations.

In summary, in-flight project transition is critical for ensuring that projects are resilient, adaptable, and capable of overcoming the challenges posed by changes, thereby safeguarding project success and organizational objectives.

CONCLUSION

Ultimately, successful project transitions contribute to the resilience and agility of an organization, enabling it to navigate changes and capitalize on opportunities swiftly and effectively. In-flight project transition in project management is effective in ensuring continuous project progress and adaptability in dynamic environments. It facilitates seamless handovers, minimizes downtime, and enables the efficient allocation of resources. By fostering communication and collaboration, it enhances responsiveness to changes and challenges. However, its effectiveness largely depends on meticulous planning, clear communication strategies, and robust support mechanisms. Overall, it plays a crucial role in maintaining project momentum and achieving objectives within set timelines and budgets.

APPENDIX

MVP- Minimum Viable Product

SLA – Service Level Agreement

KPA – Key Process Area

WBS – Work Breakdown Structure

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