Instructions to use this template

1. Use the template provided to create a supplier transition plan. You must consider points related to the transition in and transition out. Be comprehensive in your planning, considering all of the steps needed to ensure a smooth transition between suppliers.
2. You must allocate a responsible person from the CBSA staff who will manage the relevant parts of the transition.
3. You will need to identify five (5) transition in tasks and five (5) transition out tasks.
4. After you have completed the transition in and transition out steps, identify how you will monitor performance for each supplier. You can do this by listing some points to consider.

Notes to the assessor

Ensure that the student creates a professional looking table for both transition-in and transition-out tasks. The supplier transition is for internet service provision, so ensure that the tasks are relevant and appropriate to the procurement scenario.

When the student inputs the name of a responsible person in the table, it should be appropriate to the task and their role.

The student must be able to demonstrate that they can unpack the supplier transition in a way that ensures the process will be smooth and there will be no interruption to supply.

Some examples are given below. Responses here will vary from student to student. Assess the student on completeness and understanding of the task based on the benchmark responses given below.

Responses for transition in tasks

At a minimum, the student must identify five (5) of the following:

* contact finance to review payment schedule
* contact legal to review contracts
* send contract
* coordinate with service provider on when they can assess the infrastructure at the office
* coordinate with IT to ensure handover
* determine timeframe for transition period
* date for new service testing (before end of service out contract)
* date for new service to begin.

Responses for transition out:

At a minimum, the student must identify five (5) of the following:

* handover of any company equipment
* handover of any company passwords
* report on service provided
* final payment schedule
* consult legal about termination of contract
* determine schedule for handover
* consult legal – risk management
* consult IT – risk management
* handover to new service provider
* end of contract documents.

For each task listed there must be a nominated responsible person identified from CBSA’s company structure.

The date needed for each task must be congruent with the timeframe of the scenario – current contract ends in three months and new contract begins in eight weeks. Dates may be listed as actual dates or as timeframes congruent with the timing defined by the contract start/end dates.

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| --- | --- | --- | --- |
|  | 1. Transition-In Tasks
 | 1. Responsible Person
 | 1. Date Needed
 |
| 1. ☐
 | Create procurement management plan | Procurement officer | 00/00/00 |
| 1. ☐
 | RFQs sent out | Procurement officer | 00/00/00 |
| 1. ☐
 | Prepare a timeline of activities and events – confirm with supplier they can meet the timeline | Procurement officer | 00/00/00 |
| 1. ☐
 | Contract finalised and signed | Gavin Stead – MD | 00/00/00 |
| 1. ☐
 | Test day on weekend – check systems are working | Con Kafatos – IT Manager | 00/00/00 |

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| 1. How will you measure transition in performance? List two (2) KPIs or similar indicators for this.

Student responses will vary but must be consistent with the theme of the procurement in question. Transition in requires the new service provider to test and trial their systems and set up new infrastructure. KPIs should reflect these types of activity:* Response time for customer inquiry
* Quality of the materials used
* Availability for customer service
* Communication with CBSA staff
* System testing without interruption
* Cyber security in place
* Setup new passwords and access systems and communicate with staff
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| --- | --- | --- | --- |
|  | 1. Transition-Out Tasks
 | 1. Responsible Person
 | 1. Date Needed
 |
| 1. ☐
 | Confirm end of contract dates and obligations | Isha Khatri, Legal Advisor/Henry Thomas, Governance Manager | 00/00/00 |
| 1. ☐
 | Prepare a timeline of activities and events – confirm with supplier they can meet the timeline | Con Kafatos, IT Manager/Sally Fischer, Systems Analyst | 00/00/00 |
| 1. ☐
 | Prepare for return of equipment, login, and other access termination process | Sally Fischer, Systems Analyst | 00/00/00 |
| 1. ☐
 | Release any pending payments as per contract | Trish Gibbons, Accounts Officer/ Wi Zhang, CFO | 00/00/00 |
| 1. ☐
 | Issue statement of termination or non-renewal of contract | Isha Khatri, Legal Advisor | 00/00/00 |

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| 1. How will you measure transition out performance? List two (2) KPIs or similar indicators for this.

Student responses will vary but must be consistent with the theme of the procurement in question. Transition out requires the service provider to remove hardware, communicate with the customer what needs to be handed over/handed back and communicate time frames and key milestones in the handover to ensure service is not interrupted.KPIs may include the following:* handover of hardware or software access as required
* new systems are in place before removing old systems to avoid service interruption
* passwords and other sensitive data is handed over.
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