

## Task Instructions

Task ID: 501

Task Name: *Create Agency Specific Implementation Schedule*

Task Start Date: *October 9, 2023*

Task Due Date: *December 15, 2023*

### Task Description

Review the Readiness Workplan and Project timeline; develop an implementation schedule that includes agency-specific tasks to successfully implement Florida PALM at your agency.

### Task Overview

Florida PALM is a state-wide business transformation that requires each state agency to plan and execute activities necessary to ready their people, processes, technology, and data for implementation. For a transformation of this magnitude to be successful, agencies must adopt project management techniques, strategies, and methodologies that make sense for their organization. Managing activities necessary to implement Florida PALM as a project within your agency will help you be successful.

This task is one in a series of project management tasks that allow your agency to address the critical components of project planning. As you are working on these concurrent Project Planning tasks, consider how they relate to ensure alignment across your project plans.

- 500 – Create Agency Specific Project Charter (Released 10/02/2023)
- **501 – Create Agency Specific Implementation Schedule**
- 502 – Create Agency Specific Risks and Issues Management Plan (Releasing 10/09/2023)
- 503 – Create Workforce Readiness Plan (Releasing 10/16/2023)



An implementation schedule identifies the activities, tasks, and responsibilities required for implementation and aligns these to an agreed upon timeline (i.e., the Readiness Workplan and Project timeline). When monitored closely, the implementation schedule allows for timely task completion as well as identification of any issues or delays to be escalated and addressed appropriately, leading to a successful implementation.

### Elements of an Implementation Schedule

Your agency may have a standard project implementation schedule template that can be used, or you may use the optional schedule template provided below in the Supporting Materials. Independent of the template or format used, your agency implementation schedule should include at a minimum: activities with start and end dates, responsible parties, and the ability to update progress for each activity. Below are things to consider when developing your implementation schedule.

### *Agency-Specific Activities*

Gain an understanding of the agency activities required by Florida PALM by reviewing the [Agency Implementation Roadmap](#) and the [Readiness Workplan](#) (RW). You may export the RW to an excel document as a starting point for your schedule.

Collaborate and consult with your Change Champion Network (CCN) and other internal key stakeholders to identify additional tasks your agency needs to complete to ready for a successful transition to Florida PALM in January 2026. For example, beyond the RW, what other activities are required at your agency to ready:

- People – Consider activities required for potential organizational structure changes, end user understanding of current state activities, communication and training needs of agency-specific business processes and values, etc.
- Processes – Consider activities required for updating and testing all internal procedural documentation, job aids and manuals, including business processes that include agency business interactions.
- Technology – Consider activities required to remediate and test Agency Business Systems, retire Agency Business Systems, and update system documentation.
- Data – Consider activities required for data clean-up of your agency data for conversion and configuration.

You may also identify and document administrative, agency-specific activities such as resource requests (LBRs / funding requests).

### *Activity Timing*

Ensure that each activity has a specific duration: the date work on an activity is planned to start and planned to be completed.

Consider activity dependencies including predecessor and successor relationship impacts. Identify the tasks that rely on the completion of other tasks. For example, agencies will need to create agency-specific training materials before delivering agency-specific training.

Document any agency-specific milestone dates that are critical to monitor for your agency readiness. For example, agencies may identify a milestone date of “Ready to Begin Internal Agency Business System Testing” prior to the RW tasks to begin Interface Testing with the Project.

### *Responsible Parties*

Identify an activity coordinator and the team members who will assist the activity coordinator in completing the activity. The activity coordinator is responsible for ensuring the activity is completed as planned with the assigned team members. The activity coordinator is also responsible for providing progress updates and communicating any potential delays.

### *Progress Reporting*

Provide opportunity in the schedule for the activity coordinator to share progress updates for each activity. This allows for monitoring of progress of all activities in the schedule.

## Maintaining your Implementation Schedule

Your implementation schedule should be reviewed and updated regularly. Your Project Management Liaison or assigned delegate should regularly review the schedule, ensure activity coordinators are providing timely progress updates, and escalate potential issues or delays to the CCN for mitigation planning. Future recurring Readiness Workplan tasks to *Manage Agency Specific Implementation Schedule, Risks and Issues* and *Submit Bimonthly Agency Readiness Status Report* through go-live provide agencies a cadence to manage their schedule and provide an opportunity to share agency-specific activities with stakeholders.

Ongoing schedule management includes:

- Regularly monitoring the implementation schedule progress against the timeline. As the Project progresses, you may need to revise the implementation schedule to accommodate new information or changes in Project or internal agency requirements.
- Tracking actual progress against the planned schedule and adjust, as needed.
- Addressing and communicating any deviations. Through open and clear communication, regularly update stakeholders on progress and any changes to the schedule.

## How will agencies use their Implementation Schedule?

An implementation schedule is a cornerstone of any project plan. Agencies will use the schedule to:

- Plan needed activities and resources for a successful implementation.
- Monitor and evaluate agency progress.
- Share completed agency-specific readiness activities in the Bimonthly Agency Readiness Status Report.
- Communicate progress to leadership and key stakeholders.

## How will Florida PALM use this information?

### **Florida PALM Use: Informational**

This and your agency's other project management tools (e.g., Project Charter, Risk and Issue Management Plan) are critical resources for your agency's readiness for Florida PALM. Uploading your completed documents to your Readiness Workplan Task Tracker will allow the Florida PALM Project team access to the information to gain insights into your agency's unique planning or project management efforts, and to identify trends across agencies. Collectively the readiness tasks provide the Florida PALM Project team insights that allows us to better assist each agency.

## Task Instructions

Draft or update your agency specific implementation schedule through collaboration with key stakeholders and your agency CCN using the elements described above and supporting resources provided below. Track progress in your RW Task Tracker. Attach your Agency Specific Implementation Schedule document in the RW Task Tracker. Indicate task completion by updating the Readiness Workplan Task Tracker to 100%.

Instructions
1) <i>Collaborate with your CCN, functional <b>and</b> technical resources, and other key stakeholders to create an Agency Specific Implementation Schedule.</i>
2) <i>Track and record task progress in the RW Task Tracker in Smartsheet until finalized. Be prepared to discuss progress in Agency Touchpoints with your Readiness Coordinator.</i>

<b>Instructions</b>
<b>3)</b> <i>Attach your Agency Specific Implementation Schedule document in the Readiness Workplan Task Tracker.</i>
<b>4)</b> <i>When complete, update the RW Task Tracker, Agency Reported Task Progress column, to 100% and save.</i>
<b>5)</b> <i>If you have questions, participate in or review the Tuesday Task Talk recording to be released on Tuesday, October 10, 2023, or contact your Readiness Coordinator.</i>

**Supporting Materials and Resources:**

- [Readiness Workplan](#)
- [Agency Implementation Roadmap](#)
- [Florida PALM Project Management Plan](#) (see Section 4 – Schedule Management)
- [FLDS Tips for Effective Schedule Development and Management](#)
- [Sample Schedule Template](#)