

Implementation Ownership Plan

Who owns what — before the rollout starts.

WHAT THIS PLAN DOES

The Phased Rollout Planner tells your team what to do and when. This plan answers the question the rollout planner deliberately skips: who has the final say? It documents decision rights, RACI accountability, escalation paths, and long-term system ownership in one tight reference — completed before the rollout starts, ideally before the contract is signed. Use it once and keep it on file. It's the document you'll wish you had the first time something goes sideways.

HOW TO USE IT

1 Complete before the rollout

This plan slots in after the vendor is chosen and tested (Steps 3–4) and before Phase 1 of the rollout (Step 6) — ideally signed before the contract.

2 Assign owners, not teams

Every box needs one name — not a department, not “leadership.” One person who'll be on the phone with the vendor when something breaks at 7am.

3 Don't re-list phase owners

Phase task owners live in the Rollout Planner. This plan covers RACI, decision rights, and escalation paths only — the governance layer.

4 File it with the contract

This is a governance document. Keep it with your vendor contract, TCO, and Business Case — and reread it at every renewal, incident, and team change.

When to complete

After vendor selected — before signing

Who completes it

Business owner + rollout lead, together

File it with

Vendor contract + Business Case

Lock down who owns what — before the rollout starts.

Every Accountable (A) row needs one real name. A role label is not enough when something breaks.

PROJECT DETAILS

Business / organization

Technology / vendor (product & tier)

Prepared by

Date completed

RACI OWNERSHIP MATRIX

R Responsible **A** Accountable **C** Consulted **I** Informed

One A per row — never leave Accountable blank.

ACTIVITY / DECISION	BIZ OWNER	ROLLOUT LEAD	IT / ADMIN	DEPT LEAD(S)	VENDOR	ACCOUNTABLE PERSON (name)
Vendor selection — final decision <i>Who signs off on the final choice?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Contract review & signature <i>Who signs? Who must be consulted?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
System configuration & setup <i>Admin rights — who approves changes?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Data migration sign-off <i>Who verifies data is clean and correct?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
User access & permissions <i>Who controls who can see what?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Training plan & scheduling <i>Who owns training delivery?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Go-live approval <i>Who gives the final green light?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Vendor support escalation <i>Who calls the vendor for critical issues?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Budget & invoice approval <i>Who approves invoices and overages?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Contract renewal decision <i>Who decides to renew, renegotiate, or exit?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
System admin ownership (ongoing) <i>Who is the permanent internal admin?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Performance review (Step 7 Scorecard) <i>Who leads the 30/60/90-day review?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

DECISION RIGHTS SUMMARY

Who has final say on the four most common friction points

DECISION	WHAT TRIGGERS IT	DECISION OWNER (name)
Budget overrun > 10%	Who can approve additional spend without a board vote?	<input type="text"/>
Critical system outage	Who makes the call to escalate to vendor executive?	<input type="text"/>
Scope change request from team	Who decides if a new feature request gets pursued?	<input type="text"/>
Contract exit / termination	Who authorizes ending the vendor relationship?	<input type="text"/>

When something goes wrong, this page removes the guesswork.

ESCALATION PATH

Four levels — each with one named owner and a clear trigger

Level 1 — Self-Service User resolves independently <i>Trigger: Vendor help center, internal quick guides, or peer champion</i>	Same day	Owner (name, phone / email) <input type="text"/>
Level 2 — Internal Support Internal admin or rollout lead resolves <i>Trigger: Staff member can't complete a core task; a workaround is needed</i>	Within 4 hours	Owner (name, phone / email) <input type="text"/>
Level 3 — Vendor Support Vendor support ticket opened <i>Trigger: Known bug, data error, integration failure, or missing feature</i>	Vendor SLA — confirm in contract	Owner (name, phone / email) <input type="text"/>
Level 4 — Executive Escalation Business Owner calls the vendor account executive <i>Trigger: System down >2 hrs in business hours; data loss; critical breach</i>	Immediate — phone, not a ticket	Owner (name, phone / email) <input type="text"/>

LONG-TERM OWNERSHIP

Who owns the system after the rollout team moves on?

ROLE	RESPONSIBILITY	ASSIGNED TO (name)	REVIEW
System Administrator	Manages users, permissions, and settings day-to-day	<input type="text"/>	<input type="text"/>
Data Owner	Accountable for data integrity, backups, and privacy	<input type="text"/>	<input type="text"/>
Vendor Relationship Owner	Attends QBRs, reviews the contract, owns the renewal call	<input type="text"/>	<input type="text"/>
Training & Onboarding Lead	Brings new staff up to speed as the team grows or turns over	<input type="text"/>	<input type="text"/>
Contract Renewal Decision	Reviews value, benchmarks cost, decides renew or exit	<input type="text"/>	<input type="text"/>
Internal Documentation Owner	Keeps SOPs and help guides current and accessible	<input type="text"/>	<input type="text"/>

GOVERNANCE READINESS

every owner named = no gaps

TIP Reread this page at every contract renewal. If any owner is blank or "TBD," that's your first governance gap to close.

SIGN-OFF

Governance agreed & on file

Prepared by

Approved by (Business Owner)

Date signed

NEXT → Step 6: Phased Rollout Planner

With ownership clear and the contract signed, you're ready to build your 4-phase rollout plan.

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