SDI ScienceDocs Inc.
Research • Funding • AI Strategy • Est. 2004

Implementation Plan Template

A practical planning tool for moving a pilot, product launch, technology deployment, operational improvement, or commercialization initiative from decision to execution.

How to use this template

Use this document after a team has selected an initiative and needs a clear execution structure. It can be used for commercialization pilots, customer-facing implementation projects, workflow changes, AI or technology adoption, grant-to-market transitions, and operational improvement work. Fill in the plan, identify owners, confirm dependencies, and use the action tables to manage progress.

1. Implementation Overview

Project / initiative name	
Organization / team	
Implementation sponsor	
Implementation lead / project manager	
Target start date	
Target completion date	
Primary use case / business objective	
Current decision status	☐ Approved ☐ Conditionally approved ☐ Under review ☐ Planning only

2. Purpose, Scope, and Success Definition

Planning prompt	Response / working notes
What are we implementing?	
What problem or opportunity does this implementation address?	
What is in scope?	
What is out of scope?	
What will be different after implementation?	
What would make this implementation clearly successful?	

3. Stakeholders, Users, and Decision Roles

Stakeholder group / person	Role in implementation	Influence	Impact	Engagement need	Owner
Executive sponsor		High / Med / Low	High / Med / Low		
Implementation owner		High / Med / Low	High / Med / Low		
End users / operators		High / Med / Low	High / Med / Low		
Customer / pilot partner		High / Med / Low	High / Med / Low		
Technical / data team		High / Med / Low	High / Med / Low		
Compliance / legal / regulatory		High / Med / Low	High / Med / Low		
Finance / procurement		High / Med / Low	High / Med / Low		

4. Workstreams and Deliverables

Workstream	Key deliverables	Owner	Due date	Dependencies	Status
Project governance					☐ Not started ☐ In progress ☐ Complete
Technical / product setup					☐ Not started ☐ In progress ☐ Complete
Data / systems / integrations					☐ Not started ☐ In progress ☐ Complete
Operations / workflow					☐ Not started ☐ In progress ☐ Complete
Customer / user engagement					☐ Not started ☐ In progress ☐ Complete
Training / adoption					☐ Not started ☐ In

Workstream	Key deliverables	Owner	Due date	Dependencies	Status
support					progress ☐ Complete
Measurement / reporting					☐ Not started ☐ In progress ☐ Complete

5. Implementation Readiness Checklist

Implementation item	Yes / No / Partial	Owner	Notes / next action
Clear business objective and expected benefit have been documented.	☐ Yes ☐ No ☐ Partial		
Sponsor and implementation owner have been confirmed.	☐ Yes ☐ No ☐ Partial		
Target users, customers, or pilot participants have been identified.	☐ Yes ☐ No ☐ Partial		
Required data, materials, systems, or inputs are available or obtainable.	☐ Yes ☐ No ☐ Partial		
Technical requirements and constraints have been reviewed.	☐ Yes ☐ No ☐ Partial		
Operational workflow changes have been mapped at a practical level.	☐ Yes ☐ No ☐ Partial		
Legal, regulatory, security, or compliance considerations have been flagged.	☐ Yes ☐ No ☐ Partial		
Success metrics and evidence requirements have been defined.	☐ Yes ☐ No ☐ Partial		
Training, communication, and adoption support needs have been identified.	☐ Yes ☐ No ☐ Partial		
Known risks, dependencies, and decision points have been documented.	☐ Yes ☐ No ☐ Partial		

6. Milestones and Timeline

Milestone	Description	Owner	Target date	Completion evidence	Status
Kickoff / alignment					☐ Pending ☐ Complete
Requirements finalized					☐ Pending ☐ Complete
Resources and access confirmed					☐ Pending ☐ Complete
Configuration / build / preparation complete					☐ Pending ☐ Complete
Pilot or launch readiness review					☐ Pending ☐ Complete
Implementation start					☐ Pending ☐ Complete
Midpoint review					☐ Pending ☐ Complete
Final review / closeout					☐ Pending ☐ Complete

7. Resource, Budget, and Support Plan

Resource / cost category	What is needed?	Internal owner	External support needed?	Estimated cost / effort	Notes
Personnel			☐ Yes ☐ No		
Technical systems / software			☐ Yes ☐ No		
Data preparation / migration			☐ Yes ☐ No		
Training / enablement			☐ Yes ☐ No		
Consultants / vendors			☐ Yes ☐ No		
Compliance / legal / regulatory			☐ Yes ☐ No		
Reporting / measurement			☐ Yes ☐ No		

8. Communication, Training, and Adoption Plan

Audience	Message / training need	Format	Timing	Sender / trainer	Follow-up needed
Leadership / sponsor		Meeting / memo /			

Audience	Message / training need	Format	Timing	Sender / trainer	Follow-up needed
group		dashboard			
Implementation team		Working session / project board			
End users / operators		Training / guide / demo			
Customer or pilot partner		Briefing / check-in / report			
Support functions		Checklist / SOP / meeting			

9. Risks, Dependencies, and Change Control

Risk / dependency	Potential impact	Likelihood	Mitigation / response	Owner	Decision needed?
Data, access, or system readiness issue		High / Med / Low			☐ Yes ☐ No
Stakeholder resistance or low adoption		High / Med / Low			☐ Yes ☐ No
Budget, staffing, or timeline constraint		High / Med / Low			☐ Yes ☐ No
Customer / partner availability issue		High / Med / Low			☐ Yes ☐ No
Technical performance or integration risk		High / Med / Low			☐ Yes ☐ No
Legal, regulatory, IP, or security concern		High / Med / Low			☐ Yes ☐ No

10. Metrics, Evidence, and Reporting Cadence

Metric / evidence item	Baseline	Target	Data source	Reporting frequency	Owner
Operational performance metric				Weekly / monthly / milestone	
Customer or user adoption metric				Weekly / monthly / milestone	
Quality / error / rework metric				Weekly / monthly / milestone	
Time, cost, or efficiency metric				Weekly / monthly / milestone	
Commercialization or revenue-related signal				Weekly / monthly / milestone	
Qualitative evidence / stakeholder feedback				Weekly / monthly / milestone	

11. 30-60-90 Day Action Plan

Timeframe	Priority actions	Owner(s)	Expected output	Review date
First 30 days				
Days 31-60				
Days 61-90				
Beyond 90 days				

12. Implementation Approval and Next Steps

Decision item	Decision / notes	Owner	Date
Proceed with implementation?	☐ Yes ☐ No ☐ Conditional		
Conditions or open items before launch			
Immediate next action			
Next review meeting			

ScienceDocs support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization.