Cutover planning and preparation need to start from the very beginning of the project during the project initiation.
Essentially, cutover planning, preparation, and execution run the entire duration of a release. However, there are two distinct types of activities to plan:

1. **Preparation activities** – these need to be completed before a go-live decision can be made, i.e., incomplete activities may prevent go-live.
2. **Execution activities** – these are completed around the go-live event itself once all preparation is complete and the go-live decision has been confirmed.

**Cutover Preparation Activities**

Cutover preparation activities will vary depending on the specific context of a particular project. However, typical preparation activities include:

- Define cutover strategy
- Identify cutover resources
- Business preparation
- Technical preparation
- Documentation
- Transition plan
- Backup/restore process
- Batch process
- Data readiness
- Data migration
- Data creation
- Data cleansing
- Go-live checklist

Each of these will be discussed in more detail below.

**Define Cutover Strategy**

The cutover strategy must be agreed with all parties right from the start of the project during the Initiation Phase, as it will have a direct impact on the release roadmap, timelines, resources, prioritization, and many other important decisions.

Cutover strategy topics include:
- Time constraints: e.g., any IT or business blackout period when no cutover activity should be planned, e.g., during a key sales period.
- Soft launch vs hard launch: Promote the idea of frequent releases. If a “big-bang” approach is taken, the planning should consider the risks associated.
- System dependencies: Call out any dependencies with other on-going & dependent integration projects.
- Legacy system: If the solution is to replace a legacy system, the cutover strategy needs to include the migration or conversion steps from business, technical and data perspectives to ensure minimal impact and risk.

**Identify Cutover Resources**

Resources outside of the project team may be involved in go-live activities. The resource requirements and availability need to be confirmed during the Engineering Phase. In some cases, go-live execution activities will occur outside office hours which need to be factored in the resource plan.

The deployment team organization needs to be planned and shared with contact information. The decision maker and escalation path need to be in place in case an emergency or if an unforeseen situation is encountered during go-live.

**Business Preparation**

Change management is an important part of cutover planning. The customer needs to define a strategy that will enable acceptance and deliver the expected business value of the new solution. The amount of change management required varies by organization. It can involve tasks such as promoting new processes and functionalities, a communication strategy and enabling end users via training.

End-user training is designed for business users and administrators to enable them to perform their responsibilities based on the implemented solution and workflow processes. This is different to standard Hybris Commerce product training that is training based on the core underlying Hybris Commerce product, on top of which the customer’s solution has been implemented. During the Foundation Phase, the end-user training needs are discussed so that material preparation and training delivery are scheduled appropriately.

Typical end-users include:

- Content managers for managing web content, page layouts, images, etc.
- Product managers for managing products, catalogs, prices, product content, etc.
- Customer service agents for assisting customers with orders, payments, site usage, etc.
- Administrators for managing the solution itself, e.g., users, groups, passwords, structures, etc.

The project team typically provides end-user training as they have the best knowledge of the implemented solution. This training can be provided as classroom or train-the-trainer sessions depending on the needs of the customer. If train-the-trainer then one or more customer trainers will be enabled by the project team so that these customer trainers can train the other business end-users.

In either case, ideally, the training contains a large portion of practical exercises that need to be prepared up front. Training sessions are highly dependent on an appropriate and stable training environment and representative data. This needs careful upfront planning. Otherwise, environment and data issues can cause significant disruption and frustration during the training.

**Technical Preparation**

The go-live checklist covers all the technical steps that are required to take during deployment. At a high level, the hosting infrastructure needs to be planned during the Initiation Phase. The provisioning of the development and test environments is planned during the Foundation Phase. Production hardening and readiness are planned during the Engineering Phase.
Documentation

Documentation needs might include user manuals, help guides, administration guides, deployment guides and training materials. These documentation requirements need to be identified during the Foundation Phase, then appropriate effort, preparation, and completion of the documentation are planned accordingly during the Engineering Phase.

Transition Plan

Transition refers to the hand-over of the solution for long-term application management or development after go-live. This long-term model should be agreed upfront during the Initiation Phase so it can be incorporated into the project planning. Hand-over topics will typically include:

- Development & architecture, e.g., design patterns, coding standards, etc.
- Project management, e.g., processes, ways of working, etc.
- Requirements management, e.g. user stories, estimations, etc.
- Quality management, e.g., issue management process, testing flow, test automation, performance testing, etc.
- Operations, e.g., release management, infrastructure, monitoring, etc.

During the Engineering Phase, the knowledge transfer activities can start on an on-going basis (e.g., people shadowing/being part of day-to-day project work/learning by doing), or during concentrated knowledge transfer sessions.

Backup / Restore Process

It is very costly to have any problem during deployment that causes interruptions in the production site. It is, therefore, essential to have a backup and restore process in place to recover from potentially failed deployments. These processes should be defined during the Engineering Phase and tested as early as possible to allow enough time to correct any issues and re-test.

Batch Process

Batch processing represents any set of automated tasks (jobs) that are executed without user intervention. In the context of a Hybris Commerce system, batch processing includes CronJobs, Impex Jobs and any integration process such as those which transmit data to or from Hybris Commerce and ERP or other master data repositories, order processing, pricing, inventory, and business intelligence or reporting. Batch processing can also include system maintenance routines such as data backup and cleanup.

These processes should be defined as requirements during the Foundation Phase, then designed/built/tested during the Engineering Phase.

Data Readiness

Even with the best designed, developed and tested solution, if the underlying data is poor quality it can have a major impact on the solution functionality, performance and general behavior of your solution, potentially causing a significant amount of user frustration and issues.

The common examples of key data include customers, employees, orders/carts, promotion and CMS content & media.

Data readiness can be broken into the following topics:

- **Data Migration** – The data migration requirements should be defined during Foundation Phase. This strategy covers how to migrate data from other systems into SAP Hybris Commerce, perhaps from an existing solution being replaced. It also needs to consider changes to the data model. Data migration often requires the development of ETL-type processes during the Engineering Phase which needs up-front planning. It is also
important to consider data protection issues when working with real customer data. These are the common scenarios of data migration:

- Getting existing data from an existing system into a new SAP Hybris Commerce implementation (see Data Migration)
- Moving data from one database to another (see Data Migration)
- Moving data between SAP Hybris Commerce environments (see Data Migration and Options for Refreshing CMS Content Between Environments)

- **Data Creation** – During the early implementation sprints, there is typically a lot of changes to the data model requiring the Hybris Commerce system to be reinitialized with each sprint deployment, which clears the database of all structures and data. At some point, the project team needs to stop re-initializing the system with each sprint deployment so that data can be loaded, enriched and persisted between deployments in preparation for testing and go-live (e.g. product and content data). This needs to be planned ahead of time and often has data and resource dependencies.

- **Data Cleansing** - Imported data often comes from a variety of different sources, with questionable data quality. For example, properly working faceted search and navigation is 100% dependent on high-quality data on which the search indexes are built. If there’s a color facet and there’s a ‘green’ and ‘greenn’ (misspelled) value, there will be two values shown instead of one or the ‘green’ value is used, and it misses the product with the misspelled value. The quality of source data needs to be assessed from the start of the project during the Foundation Phase and appropriate time and resources planned to ensure it’s corrected before being imported for go-live.

**Go-live Checklist**

A go-live checklist is essential to ensure that no steps are missed during deployment to the live production environment. This checklist should contain task descriptions, dependencies, owner, and status. The checklist is defined during the Engineering Phase, and will be reviewed with the team during the Deployment Phase. See the sample go-live checklist Excel document attached to the Infrastructure Considerations for more details.

**Cut-over Execution Activities**

Cut-over execution activities are completed around the go-live event itself once all preparation is complete and the go-live decision has been confirmed. These will generally consist of:

1. Preparation tasks leading up to go-live day, e.g., validating the go-live checklist, final testing of system integration points, etc.
2. Preliminary tasks on go-live day, e.g., stopping transactions to the solution being replaced
3. Go-live activities, e.g., removing holding page
4. Immediate post-live activities, e.g., end-to-end testing transactions, monitoring system resources, etc.
5. Activities following go-live day, e.g., continuous monitoring of transactions, system resources, responding and resolving post-live issues as quickly as possible

These tasks and activities will be covered by the Deployment Phase.

**Recommended Practices**

- Data Migration Requirements
- Data Migration
- Options for Refreshing CMS Content Between Environments
- Infrastructure Considerations