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## Template Guide

### **What is an Acceptance Plan?**

*“Acceptance” is defined as gaining agreement from the customer that the deliverables produced by the project meet the criteria defined by the customer. The criteria upon which acceptance is based may be viewed in terms of the quality of the deliverable produced, the cost of building the deliverable or the timeframe in which the deliverable is produced.*

*An Acceptance Plan usually includes:*

- *A list of the milestones to be achieved and deliverables to be produced*
- *A set of criteria and standards for the acceptance of deliverables by the customer*
- *A plan outlining how the deliverables will be reviewed to determine whether or not they meet the criteria and adhere to the standards set by the customer*
- *A process for gaining customer acceptance once the deliverables have been produced*

### **When to use an Acceptance Plan**

*The Acceptance Plan is a key document within the project. It is usually constructed near the end of the Project Planning phase, after the Project Plan, Resource Plan, Budget Plan and Quality Management Plan have been identified. The Acceptance Plan builds upon all prior planning documentation by specifying the completion criteria and the timeframes which must be adhered to. The Acceptance Plan is referenced throughout the Execution phase as each deliverable is produced and presented to the customer for final acceptance. The Acceptance Plan is also referred to during the Closure phase as part of the Project Closure Report and the Post Implementation Review.*

### **How to use this template**

*This document provides a guide on the topics usually included in an Acceptance Plan. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.*

# 1 Acceptance Criteria

To successfully complete a project, a set of deliverables must be produced which meets the requirements of the customer. This document defines the criteria which must be met and the review process which must be undertaken to ensure that each deliverable produced does in fact meet the requirements of the customer.

## 1.1 Definition

[Define the term “acceptance” for the purposes of this project. For example:

“Acceptance is defined as gaining agreement from the customer that the deliverables produced by the project meet the criteria defined by the customer”]

## 1.2 Milestones

[List and describe each of the Milestones and Deliverables for this project.]

Milestone		Deliverable	
Name	Description	Name	Description
Financial System Upgraded	Implement the software package on new hardware and provide access to the internet	Software Package installed	Implementation of General Ledger (GL), Accounts Payable (AP) and Accounts Receivable (AR) software
[Name]	[Description]	[Name]	[Description]
[Name]	[Description]	[Name]	[Description]

## 1.3 Criteria

[Identify the acceptance criteria and standards to be achieved for each deliverable:]

Deliverable	Criteria	Standards
Software Package installed	System functionality: <ul style="list-style-type: none"> <li>GL tested &amp; installed</li> <li>AP tested &amp; installed</li> <li>AR tested &amp; installed</li> </ul> <u>System Performance</u> <ul style="list-style-type: none"> <li>System up-time</li> <li>System response-time</li> <li>Data transferred</li> </ul>	System functionality: <ul style="list-style-type: none"> <li>GL operational with no errors</li> <li>AP operational with no errors</li> <li>AR operational with no errors</li> </ul> <u>System Performance</u> <ul style="list-style-type: none"> <li>99.9% system uptime</li> <li>&lt; 1 second response times</li> <li>100% data accuracy</li> </ul>
[Deliverable]	[Criteria]	[Standards]
[Deliverable]	[Criteria]	[Standards]

[The criteria and standards listed must convince the customer that the deliverables produced can be sufficiently measured to ensure that their requirements are met. Although the criteria listed primarily address “product” quality, other types of criteria may be used. For example:

- The quality of new processes delivered by the project
- The timeliness of the products and processes actually delivered
- The financial expense incurred in delivering the products.]