

Migration planning checklist

Work through the decisions and checks that make a move manageable.

Scope and accountability

- ☐ Define the business outcome, source and target systems, included history and exclusions.
- ☐ Name business, data, technical and acceptance owners. Agree who can make go/no-go decisions.
- ☐ Identify retention, confidentiality, access and client-specific requirements with the appropriate owners.

Notes: _____

Understand and prepare the data

- ☐ Profile completeness, uniqueness, validity and relationships using representative data.
- ☐ Document field mappings, transformations, reference data and exception handling.
- ☐ Agree who fixes issues, where fixes happen and how changes are controlled.

Notes: _____

Rehearse and validate

- ☐ Set acceptance criteria before moving data: counts, balances, relationships and business scenarios.
- ☐ Rehearse with approved data and permissions. Measure duration, throughput and manual effort.
- ☐ Record rejected records and reconcile results with business owners. Test downstream integrations and reporting.

Notes: _____

Cutover and stabilisation

- ☐ Plan freezes, final changes, sequence, dependencies, communications and support cover.
- ☐ Define rollback triggers, decision deadlines and a rehearsed recovery approach.
- ☐ Obtain documented acceptance, monitor the live service and resolve exceptions.
- ☐ Decommission old copies only after agreed validation, retention and recovery needs are satisfied.

Notes: _____

Want help working through this? Email david.butcher@pivotalinnovations.co.uk