

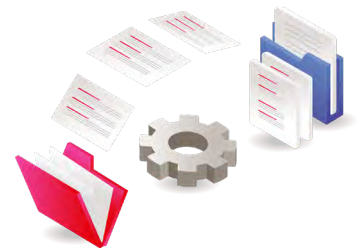


## Best practices checklist for content migration projects

Many companies have to update or replace their systems with modern, often cloud-based Enterprise Content Management (ECM) solutions. In order to avoid common pitfalls and minimize disruptions during migration projects, we want to share insights and learnings from decades of successful migrations across multiple industries.

### Frequent challenges and pitfalls in content migration projects

- Risk of data loss
- Incompatibility between source & target systems
- Compliance & regulatory requirements
- Interruption of business operations
- Budget & time constraints
- Underestimation of project complexity
- Overestimation of existing data quality
- Insufficient & unclear communication



## 1 Pre-migration phase – Project preparation



### Build project team

- ☐ Set up a cross-functional stakeholder team, gather their pain points and requirements, and involve them in the decision-making process. Include not only management and end-users of current/future systems, but also IT, data privacy, and security specialists.
- ☐ Communicate transparently and continuously: All stakeholders should be informed about the migration strategy/approach and understand the benefits/impact of the migration initiative.
- ☐ If required, look for assistance from a professional, external migration service provider.

### Define objectives and scope

- ☐ Create timelines, define milestones, and allocate the necessary budget.
- ☐ Discuss and set project objectives. Perceive migration as an opportunity to achieve greater efficiency and better user experiences rather than a copy exercise across systems.
- ☐ Decide on target platforms and your optimal migration approach. Choose between »Big Bang« (full data transfer at once) and a staged migration executed in »waves«. Especially for large workplace migrations to the cloud consider a factory assessment to scale the process.

### Choose right tools

- ☐ Research the market for the right software or toolset for the upcoming migration. Consider timeline and budget constraints that may affect the selection. In simple scenarios, an inhouse built tool or script might be reasonable and sufficient.
- ☐ Select a robust migration software. Ensure it supports your source and target systems, matches your volume requirements, and provides metadata mapping and transformation, as well as security and traceability, reusability, and automation capabilities.



*No matter how accurate your preparation is, be aware that a migration usually takes longer than expected. Plan a buffer for possible delays and additional costs in each project phase.*

## 2 Pre-migration phase – Data preparation



### Assess data sources

- ☐ Identify the current source systems and in-scope data/documents and get an overview about the involved data volume.
- ☐ Make an in-depth analysis of data types, formats, structures, and permissions, and assess data dependencies, business rules, and workflows to understand the complexity of the source data and its associated metadata.
- ☐ Identify data gaps, incorrectly filed data, inconsistent attribute tagging, redundancies, or duplicates. Decide whether to migrate, archive, or delete. Use this opportunity to clean-up your system environment and remove legacy issues.

### Define data mapping and transformation process

- ☐ Determine the use cases and target system requirements and restrictions.
- ☐ Based on this, define a strategy for reclassifying and mapping metadata (attributes, categories, object/content types) from the source to the target systems. Think of mapping dependencies and relationships between data objects and how to handle custom fields between source and target systems.
- ☐ Describe mapping rules in a migration mapping specification. The design of the target systems and applications is a mandatory prerequisite to define any migration rule.
- ☐ Specify rules and methods for the data transformation and cleansing to align with the target system capabilities. Include data formatting, data normalization, and quality assurance.
- ☐ Establish validation rules to increase the data quality, ensure data accuracy, homogeneity, and consistency across your systems. Consider potential industry-specific regulatory requirements.
- ☐ Configure users, access permissions, and security measures.



*Also test the integration with other systems or applications. Consider conditions that may break your data or applications, e.g. links between documents or references from third-party applications.*

## 3 Migration phase



### Run test migrations in staging environment

- ☐ Before migrating to production, test the migration process in a staging environment to identify and resolve any issues or errors. Develop test plans to verify migration methods and validate migrated data. Use production source data also for staging migrations wherever possible to prevent later surprises as test data might not be representative.
- ☐ Create a reliable data backup to mitigate the risk of incompletely or incorrectly migrated data. Establish a recovery plan in case of unforeseen issues during the process.

### Conduct incremental migration

- ☐ For the actual production migration, ensure access to a secure and high-performance environment: Provide sufficient database resources, a stable network connection, and make sure other hardware requirements are met.
- ☐ Execute the migration process as per the defined strategy. Avoid significant impacts on the end-user performance by scheduling the migration outside of business hours. Communicate to the users in advance about possible downtime windows and potential workarounds.
- ☐ Remove the write access to data and content to make sure that users are not making any edits while the final cutover migration process is ongoing.
- ☐ Consider migrating content in smaller batches rather than all at once and prioritize which content needs to be migrated first. This gives more control, minimizes the impact on users, and eases troubleshooting afterwards.



*Especially when migrating hundreds of terabytes in many increments or clusters, start with small productive pilot migrations.*



## Perform real-time monitoring and reporting

- ☐ Continuously monitor the migration process and set up logging mechanisms to track the progress. Be prepared to address major issues or performance issues promptly. Have all relevant stakeholders lined up.
- ☐ Have a plan ready in case the migration encounters critical issues. This should include a procedure to revert to the previous state with minimal time loss.
- ☐ Effective communication is essential for success. Keep stakeholders updated about the migration progress and occurring issues. Detailed cutover lists that are being updated while the migration progresses are very helpful.
- ☐ Conduct data validations of smaller sets and quality assurance checks. Verify the migrated content matches the transformation concept.

## 4 Post-migration phase



### Validate migrated data

- ☐ In order to verify the data accuracy and completeness between the source and target systems, check and confirm that all content is successfully migrated and accessible in the new systems in accordance with the migration plan and specification.
- ☐ Run different operational scenarios and check for missing data, broken links, and inconsistencies to validate the data integrity and functionality. Also carry out quality checks for metadata and dependencies.
- ☐ Conduct end-user acceptance tests to gather feedback.
- ☐ Offer training sessions for end-users on the new systems, including any changes in content access and management.
- ☐ Update your documentation.
- ☐ Regularly review the content in the new systems for any post-migration issues.

### Review outcome with stakeholders

- ☐ Review the results with the project team to evaluate project essential metrics such as duration, costs, errors, and satisfaction.
- ☐ Document the lessons learned for future migrations.

If you have any further questions about your upcoming migration project, our migration specialists will be happy to assist you.

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