

# Planning and checking data migration

Manage migration as a project in its own right: agree scope, clean the data and rehearse the full transfer.

Done

## Scope and ownership

- ☐ Appoint business and technical owners with clear approval authority.
- ☐ Separate required data from legacy records and agree archiving arrangements.
- ☐ Document source systems, export options and access permissions.
- ☐ Agree field mappings and formats between the source and target systems.

## Cleanup and testing

- ☐ Remove duplicates and correct missing or invalid values before import.
- ☐ Check data sensitivity, retention requirements and secure transfer methods.
- ☐ Run at least one complete rehearsal with realistic data.
- ☐ Reconcile record counts, totals and representative records with business users.

## Cutover and approval

- ☐ Resolve rehearsal errors and repeat the affected checks.
- ☐ Agree the change freeze, final data transfer and cutover window with operations.
- ☐ Verify backups, recovery procedures and rollback options in advance.
- ☐ Arrange business sign-off and post-launch data checks.

### DECISION NOTE

Approve migration only when data quality, business completeness and the cutover process have been demonstrated.

### Open issues / next steps

Date / owner: \_\_\_\_\_