



# A GENERAL DATA MIGRATION CHECKLIST



# Table of Contents

<b>FIRST THING FIRST: SCHEDULING THE DATA MIGRATION DATE AND INFORMING YOUR CO-WORKERS</b>	<b>3</b>
PICK THE MOST SUITABLE MIGRATION DATE	3
INFORM YOUR TEAM	4
SOURCE-RELATED WORK	4
TARGET-RELATED WORK	5
RUN A FREE DEMO MIGRATION AND CHECK ITS RESULTS	5
<b>TIME FOR THE FULL DATA MIGRATION</b>	<b>6</b>
BEFORE INITIATING THE MIGRATION OF ALL YOUR RECORDS	6
MIND THE TIME FRAME	6
AVOID ANY LAST-MINUTE CHANGES OR INTERFERENCE IN THE MIGRATION PROCESS	6
DURING THE FULL DATA MIGRATION	7
AFTER ALL THE RECORDS GOT TRANSFERRED	7
CHECK THE RESULT OF THE FULL DATA MIGRATION	7
SET UP YOUR NEW PLATFORM	7
<b>A BOTTOM LINE</b>	<b>7</b>
<b>WHY MIGRATING WITH US</b>	<b>8</b>



One famous Latin proverb says that “To win a war quickly takes long preparation.” The Help Desk Migration team agrees with this statement and notes that moving your data from one platform to another requires a thorough and detailed preparation process. However, it can go smoothly if following step-by-step instructions on making yourself ready for data migration.

So, to assist you in preparing your records for the transfer, we’ve prepared a detailed data pre-migration checklist for you. Let’s get your data migration preparation started!

Note: Keep in mind that this pre-migration checklist is a general one. The exact list of actions you need to take before migrating your data between platforms depends on what kind of source and target you have. By the way, we have several specific [Data Import Checklists](#) that are adjusted to the individual peculiarities of such platforms as Zendesk, Freshdesk, JSM, and others. Just in case you haven’t found a specific for your platform checklist by following the link above, simply use this generalized checklist and feel free to [contact our support team](#) if having any questions.

## FIRST THING FIRST: SCHEDULING THE DATA MIGRATION DATE AND INFORMING YOUR CO-WORKERS

Once you’ve decided to migrate your data from one platform to another, it’s high time to start planning the process in detail. Also, don’t forget to bring your team up to speed.

### PICK THE MOST SUITABLE MIGRATION DATE

Believe us or not, your data migration’s success depends much on the date when it will take place. And here are the reasons why.

- Firstly, the amount of platform-related workload on your data transferring day will impact the speed of the process. So, we recommend choosing a date with the smallest possible amount of data-related work. This way, you’ll prevent slow-downs or even interruptions in data migration;
- Secondly, you won’t be able to work with your source platform while the transferring process is going on, as it may lead to data mishaps. Therefore, it’s essential to plan the migration for the day when you won’t need to work on your current platform.

A tip from the HDM team: If you would nevertheless need to use your source platform during the data transferring process, you have the option of a [delta migration](#) for an extra fee. Contact us to discuss it in detail.



## INFORM YOUR TEAM

After scheduling the date for the transferring process, we would advise you to talk to your team and other co-workers (such as the CEO, customer support representatives, or anyone else who could be affected by the data migration) about your plans. Do not only inform them about the day of your data migration but also provide your team members with enough knowledge regarding the process.

Moreover, it's crucial to inform your team in advance so that they would have enough time to get used to your target platform and avoid difficulties throughout the working process.

Finally, how about not only informing your team about your data migration but also distributing pre-migration responsibilities among them? For example, some employees can close tickets in your current platform while others will be checking whether all the records migrated correctly afterwards.

**A tip from the HDM team: Send an email to your team or set up a reminder concerning the transferring process a day before it occurs. This way, you will prevent somebody from continuing working with your source platform on the migration day.**

## SOURCE-RELATED WORK

Before migrating to your new platform, it could be useful to clean up some data on your current one. If you've been using your present-day platform for a while, there is a chance that you might have some historical data you won't probably need in the future on it.

Furthermore, if you simply transfer all of your current platform's records to a new one, it might end up with some messy data. So, in order to keep your new platform organized, clean up your source beforehand.

One more essential thing: the price for the HDM service depends on the number of migrated records. So, you could significantly reduce your paycheck by cleaning up the unnecessary data as a part of your source-related work. We'd recommend you to leave only those records that might come in handy in the future.

**A tip from the HDM team: Ask your co-workers who deal with the records regularly to separate the essential items from the unnecessary ones. There is no doubt that they know what to keep and what to leave out, especially when speaking about duplicates, invalid emails, and unassigned ticket conversations.**



In case you don't have enough time or employees to clean up your data before the migration process, the Migration Wizard tool can perform a simple data filtering for you. Don't forget to [drop us a line](#) in advance and tell us the criteria you'd like to apply to filter your data.

## TARGET-RELATED WORK

After preparing your old platform for the data transfer, it would be useful to make your new one ready, too. The target-related work usually depends on the platform you're migrating to, so either check one of our specialized [Data Import Checklists](#) or [contact our support team](#).

As well, don't forget that some platforms have certain peculiarities or limitations. So, don't forget to check them before starting the migration process. You can either explore our [Knowledge Base](#) or simply [drop us a line](#), and we'll help you out.

Finally, turn off the notifications before migrating your data. Thus, you won't get any messages that could interrupt you and your team during the transferring process.

That's it. You're almost ready to start a free demo migration.

A side note: Keep in mind that there's always room for customized data migration. In case you have any specific wishes or requirements regarding the transferring process, contact our support team, and the HDM data masterminds will do their best to filter your data, map the route of your tickets, add tags to your records or do anything else for you.

## RUN A FREE DEMO MIGRATION AND CHECK ITS RESULTS

One of the benefits the HDM service offers is a free demo. It will allow you to see how the Migration Wizard tool works before proceeding with the full data migration. Moreover, it is free of charge, and you can repeat it multiple times.

In order to run a free demo migration, log into your Migration Wizard account. Then, connect your source and target platforms (by the way, make sure that you have admin rights to your accounts). After that, select the entities you want to transfer and map their route. Finally, initiate the demo migration process. It will allow our tool to choose 20 random tickets and move them from your current platform to a new one.

After your demo migration is complete, you'll see a bunch of downloadable reports that will indicate how your data migrated from source to target. Since demo migration is an exact copy of the full data migration but on a smaller scale, it's essential to check its result in a proper way. So, make sure that everything was transferred the way you wanted.

By the way, we have several specialized guides on how to [review the result of your demo migration](#) depending on your target platform. Feel free to go through them if needed.

A tip from the HDM team: In case you have some tickets with multiple replies, attachments, or notes and want to see the way they can migrate from your current platform to a new one, you can request a custom demo which will allow you to see how specific ticket IDs would migrate. In order to do so, contact us beforehand to discuss everything in detail.

## TIME FOR THE FULL DATA MIGRATION

So, after running the free trial and checking its result, you're only one step away from enjoying your new platform. The only thing which is left is the full data migration that will allow you to migrate all the needed data from your current platform to a new one.

### BEFORE INITIATING THE MIGRATION OF ALL YOUR RECORDS

#### MIND THE TIME FRAME

The duration of the full data migration strongly depends on the number of records you want to move and can vary from several minutes to several days. Don't worry, though, as there is no need for you to sit in front of your screen while the full data migration is running. It would be enough to just check on the transfer from time to time or ask your co-workers to do it for you.

Moreover, the HDM team will keep an eye on the data migration process and contact you right away in case something seems out of place.

#### AVOID ANY LAST-MINUTE CHANGES OR INTERFERENCE IN THE MIGRATION PROCESS

Keep in mind that even the tiniest last-minute alternations of the data migration process may result in numerous problems that require a lot of effort to be solved or even lead to the failure of the transferring process. Furthermore, interference in the data migration process may result in such unwanted consequences as distorted records.

A tip from the HDM team: As our practice shows, most of the data-alteration things can wait up until the data migration is complete. Moreover, no data entry, including the creation of new tickets, should go into your old system during the Full Data Migration, as such updates won't be migrated anyway.



## DURING THE FULL DATA MIGRATION

Once feeling ready for the full data migration, initiate it and let all your records be transferred one by one from your source to target. However, please keep in mind that the migration process will only begin after the two following requirements are accomplished:

- **Your payment is confirmed.** As the processing of your order might take some time, we recommend you pay in advance. Also, you can take advantage of our 'schedule' feature and choose a preferable time and date of the migration after paying for it;
- **You've agreed with the checklist.** You'd also need to click on the corresponding field to open a mini checklist of the important steps you should take before the data transfer. Don't forget to put a tick in a checkbox if everything looks good.

After the full data migration has begun, simply leave it as it is and wait till it is complete. As we have already mentioned above, do not change anything while the process is running. Just in case you have any questions during the full data migration, [contact our team](#) immediately.

## AFTER ALL THE RECORDS GOT TRANSFERRED

### CHECK THE RESULT OF THE FULL DATA MIGRATION

As soon as your full data migration is complete, it is vital to check its result. Just like you did after the free trial, go through the data migration report and make sure everything migrated correctly.

If you have noticed that something is out of order, [give us a call](#) as soon as possible.

### SET UP YOUR NEW PLATFORM

Apply some final settings to your new platform. Also, do not forget to turn on the notifications in case you turned them off before initiating the migration process.

That's it! Enjoy your new platform!

## A BOTTOM LINE

Hopefully, after going through this checklist, you're ready to perform the data transferring process. Just in case you have any questions left, [contact our support team](#), and they'll be more than happy to help!

More data migration checklists [here](#).



# WHY MIGRATING WITH US

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## It's much quicker compared to transferring your records on own

Take advantage of the rapid transferring process due to the full automation of the Migration Wizard software and the chance to instantly initiate the full data migration if you're transferring records between the backed platforms.



## Your data continues to be safe and sound throughout the moving process

Move your records around a safe connection and benefit from a regularly updated privacy policy that assures the security of your data both during and after the migration procedure.



## The customers of our service appreciate and approve it

Join thousands of happy customers who transmitted their data with the Help Desk Migration service and helped it to attain reputation and earn a variety of customer service-related rewards.



## Broad mapping opportunities will assist you to retain your records connected

Benefit from an opportunity to map both standard and custom fields while determining the route of your data and, thus, adjust the migration of your records according to your individual wishes and sustain the relationships between your data.



## You can schedule the most convenient time for your data transfer

Migrate your entities at the most suitable time by booking your data migration for the time that will work best for your team and your customers.



## You can rely on the expert and assisting support team

Obtain the assistance of a team of data transfer specialists who have years of records moving experience behind their shoulders and you will be happy to help you out through the whole transferring process at any time (even on weekends).





# LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

