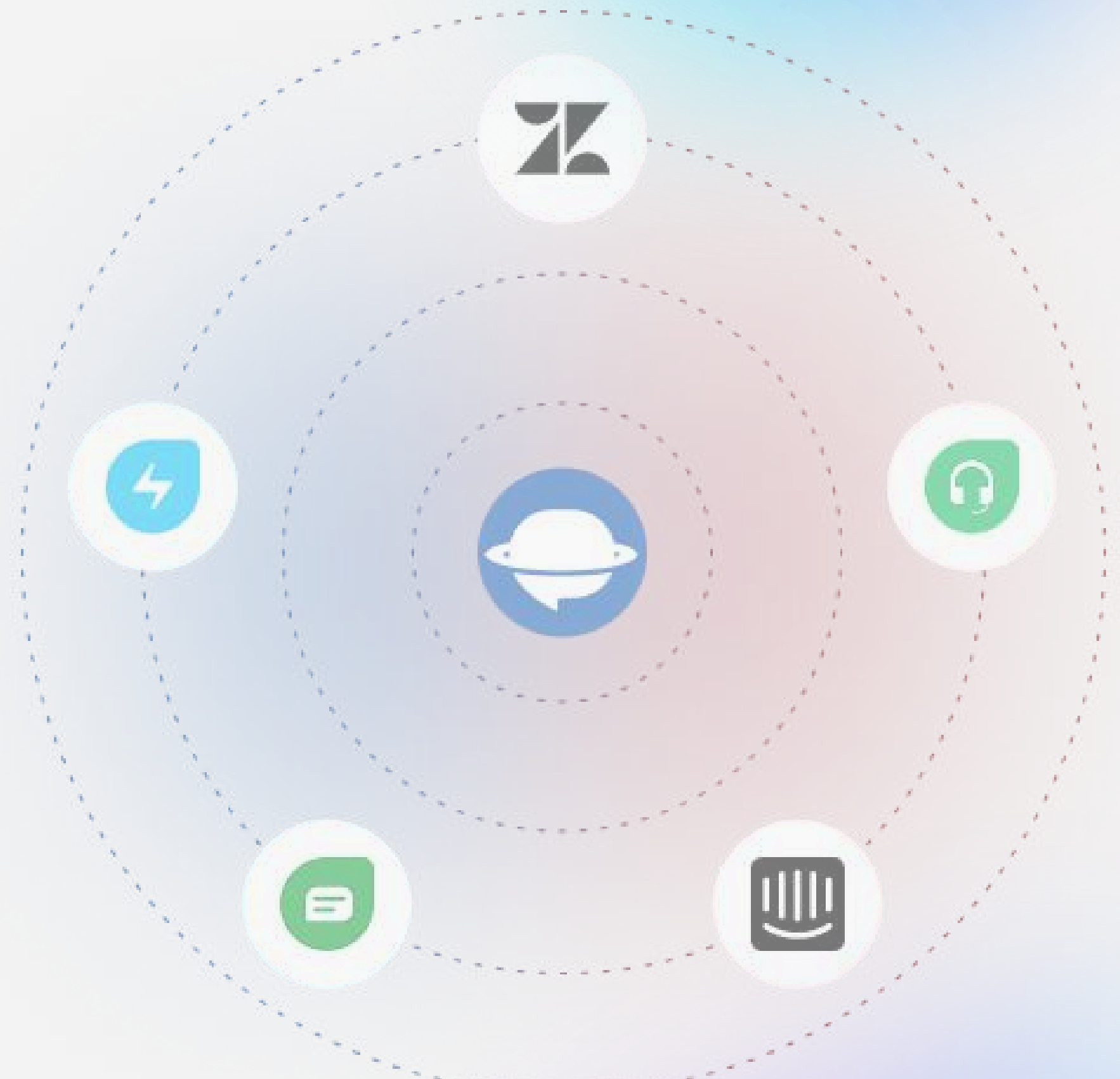


Zendesk to Zendesk Migration Playbook

How global teams rebuilt, consolidated, and scaled Support



 Roland

 Lenovo

 Airbyte

 UrbanYou



157 reviews



5 star rating

Highly rated by Zendesk customers

Why Zendesk to Zendesk Migrations Happen

Zendesk to Zendesk Migration Guide

Roland: Migration Case Study

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Key Takeaways

Next step: Run a Free Demo Migration

Why Zendesk to Zendesk Migrations Happen

A Zendesk to Zendesk migration is a strategic move to optimize your support architecture, but it is a common misconception that staying on the same platform makes the process a simple "copy-paste" task.



Merging multiple Zendesk accounts

Consolidate disparate instances following growth or M&A to create a unified support operation. Merge Zendesk accounts to eliminate silos and centralize reporting.



Moving to a new Zendesk environment

Transition from an existing instance to a brand-new one to meet modern governance standards or regional data residency requirements. Use a Zendesk environment migration to reset your foundation without losing your history.



Rebuilding legacy configuration

Over time, legacy fields, redundant tags, and outdated workflows create "technical debt" and reporting friction. A Zendesk data restructure allows you to "clean the house" before moving in.



Scaling enterprise support operations

As support scales across multiple regions and brands, a standard setup often becomes insufficient. An enterprise Zendesk migration aligns complex processes and multi-brand reporting.





Zendesk to Zendesk Migration Guide

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Key Takeaways

Next step: Run a Free Demo Migration

Below is a practical, low-risk workflow teams use to migrate Zendesk data to a new Zendesk environment or merge accounts.

01 Connect the source and target Zendesk accounts
Securely sign up for both Zendesk instances using two-factor authentication (2FA). Encrypted connections protect your data during the initial handshake.

02 Configure field and data mapping
Align your source Zendesk data with the new environment. Select records for transfer and map fields for tickets, contacts, organizations, macros, triggers, and articles to ensure high accuracy.

03 Choose built-in migration options
Apply automated rules to handle your specific scenario. You can skip or include attachments based on storage limits, add unique tags like migrated_2026 to identify moved records, convert side conversations into private notes, etc.

The screenshot displays two side-by-side views of a Zendesk ticket. The left view, labeled 'SOURCE PLATFORM', shows a ticket titled 'Email integration not syncing...' with a status of 'In Progress' and a priority of 'High'. The ticket details include the ID '#HD-2024-001247', tags for 'email', 'integration', and 'outlook', and contact information for Sarah Martinez (sarah.martinez@acme.com) from Acme Corporation Ltd. The ticket was created on Jan 15, 11:30 AM. Comments show Sarah Martinez reporting the issue and David Chen responding to thank her.

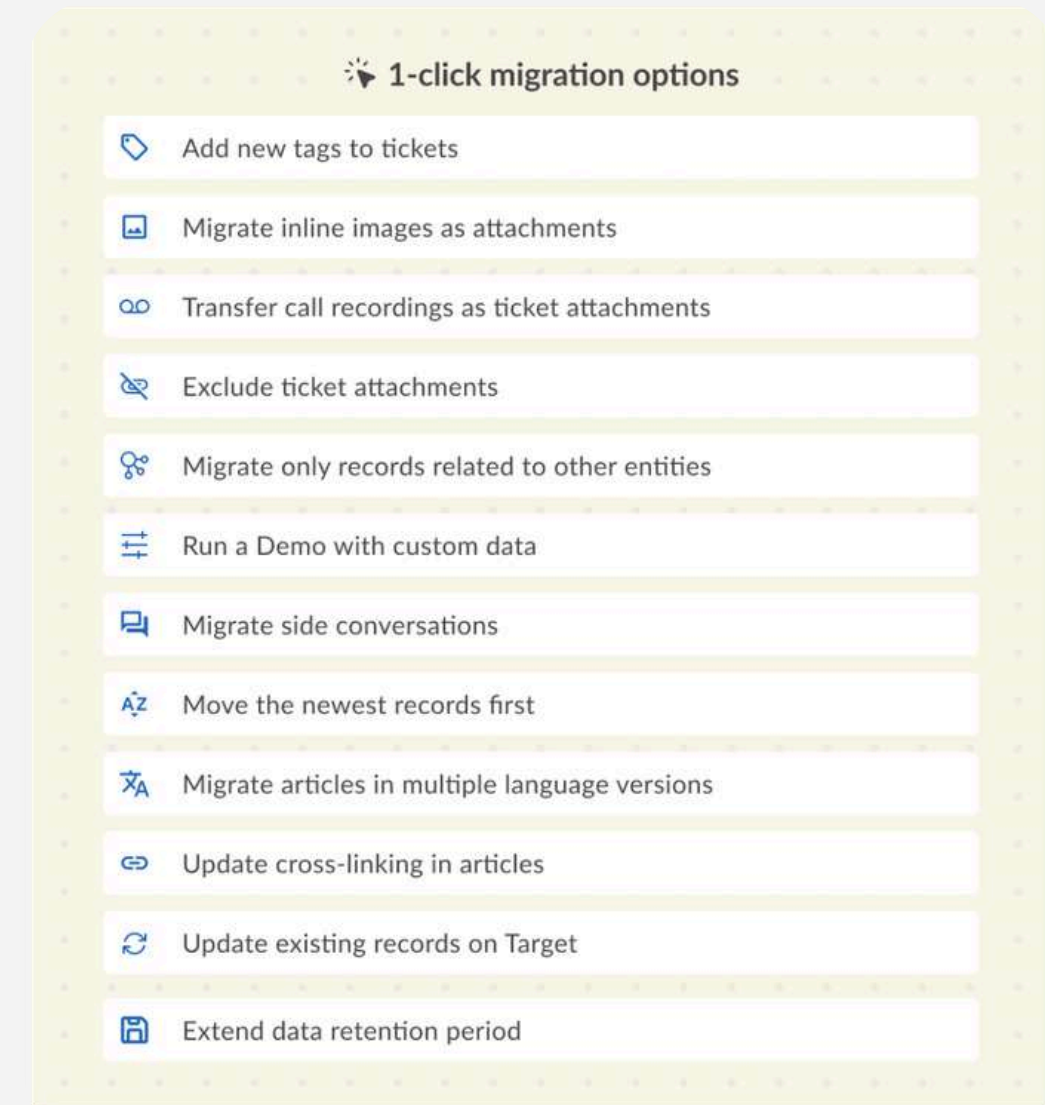
The right view, labeled 'TARGET PLATFORM', shows the same ticket with a title 'Email integration not syncing properly with...' and a status of 'In Progress' and priority of 'High'. It features 'AI Insights' with an 'Urgency' of 85%, 'Similar Issues' (3 found), and 'ETA' (3 found). The ticket is assigned to Sarah Martinez (Agent) and David Chen (Agent). The 'Recent Activity' shows Sarah Martinez reporting the issue and David Chen responding to pass it to engineering.



Zendesk to Zendesk Migration Guide

Below is a practical, low-risk workflow teams use to migrate Zendesk data to a new Zendesk environment or merge accounts.

- 04. Run a Free Demo Migration**
Migrate a small sample of live data (e.g., 20 tickets) to preview results. Use this essential trust step to validate your mapping before the full transfer.
- 05. Validate Zendesk migration Results**
Audit the demo records in your target Zendesk to confirm that tags and custom fields appear correctly, files remain accessible, and conversation history remains intact and chronological.
- 06. Run Full Migration**
Execute the transfer during a planned maintenance window. Use the proven demo configuration to ensure a predictable, controlled cutover.
- 07. Post-migration QA & verification**
Perform a final check for completeness. Confirm that agents can access historical data and verify that automated workflows function correctly before final sign-off.



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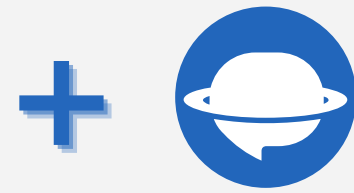
Key Takeaways

Next step: Run a Free Demo Migration



Real Customer Case Studies





Help Desk Migration

Why Zendesk to Zendesk Migrations Happen

Zendesk to Zendesk Migration Guide

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UrbanYou: Migration Case Study

Key Takeaways

Next step: Run a Free Demo Migration

Roland unified its global customer service by executing a Zendesk to Zendesk migration in efficiency, moving data from regional silos into a central hub.

About the company

Roland Corporation was founded in 1972 by Ikutaro Kakehashi in Hamamatsu, Japan. Over the past five decades, Roland has become one of the most influential brands in electronic music history.

The company designs and manufactures: electronic musical instruments, electronic drum kits, amplifiers, and studio production equipment.

The company operates globally, serving professional musicians, hobbyists, recording studios, educational institutions, and live performance venues. Its products have played a defining role in shaping modern electronic music.



Paul McCabe
VP of Global Customer Experience



Feedback

Honestly, I was really pleasantly surprised by how responsive the company is. I was left to wonder, do you guys even sleep? I was able to get responses to virtually every question each time I was asking within a few hours, even considering the time zones.



Roland



Electronics



Hamamatsu, Japan

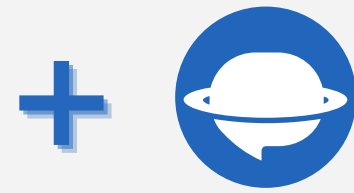
Data migrated:

- Tickets
- Contacts
- Companies
- Agents
- Groups

Migration option

- Agent matching
- Customized field mapping
- Migration filtering





Help Desk Migration

Migration Overview

Key Challenges

- **Global Coordination:** Managing a migration across multiple time zones (Japan, Canada, USA) to avoid performance lags.
- **Complexity:** Maintaining data integrity while moving data from regional silos into a centralized global structure.
- **Initial Security Concerns:** Ensuring GDPR compliance and PII (Personally Identifiable Information) protection for a high-profile global brand.

Help Desk Migration Solutions

- **Consultative Testing:** Iterative testing via the Demo Migration to build stakeholder confidence.
- **Responsive Support:** 24/7 technical assistance that bridged the gap between time zones.
- **The "Clean House" Approach:** A systematic 8-week project timeline involving data cleanup, automated field mapping, and post-migration optimization.

Outcome & Result

1. **Unified Service:** Successful Zendesk account consolidation into a central, high-performing instance.
2. **Operational Efficiency:** Achieved consistent global reporting and shared development across all regions.
3. **Data Integrity:** Validated results through tight feedback loops (10–15 minute tests), ensuring all user records and tickets landed correctly.



Why Zendesk to Zendesk Migrations Happen

Zendesk to Zendesk Migration Guide

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UrbanYou: Migration Case Study

Key Takeaways

Next step: Run a Free Demo Migration

Lenovo + Help Desk Migration

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UrbanYou: Migration Case Study

Key Takeaways

Next step: Run a Free Demo Migration

Lenovo needed to merge Zendesk accounts by moving a massive volume of tickets from a partner's instance into Lenovo's internal environment quickly and securely.

About the company

Lenovo is a Fortune Global 500 technology company operating in 180 markets worldwide. The company designs, engineers, and manufactures a broad portfolio of smart devices, infrastructure solutions, and enterprise technologies.

Its Intelligent Transformation strategy focuses on delivering enhanced digital experiences and scalable technology solutions globally. The migration project was conducted for one of Lenovo's divisions, supporting Private Cloud Solutions operations.



Ionut Birzu
Operations Manager for Lenovo Private Cloud Solution



Feedback

The overall experience was excellent. I appreciated the constant follow-up that I received from the Account Managers at Help Desk Migration service.



Lenovo



Information Technology



China

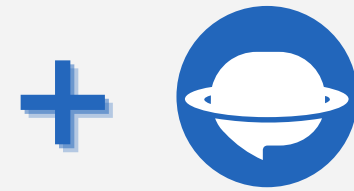
Data migrated:

- Tickets along with related records
- Contacts
- Companies
- Agents
- Groups

Migration option

- Demo Migration
- Data filtering configuration
- Field and tag mapping





Help Desk Migration

Migration Overview

Key Challenges

- **Time Sensitivity:** The primary hurdle was the need to migrate Zendesk to Zendesk within a very tight "quick period of time" without losing historical context.
- **Volume & Scale:** Moving enterprise-level ticket data between independent instances while maintaining link integrity for future reference.
- **Complexity:** Navigating a partner-to-corporate Zendesk account consolidation while ensuring compliance with internal IT standards.

Help Desk Migration Solutions

- **Self-Service Speed:** Lenovo utilized the automated help desk migration solution to bypass manual scripting, significantly reducing the migration timeline.
- **Constant Account Management:** Despite the "self-service" nature, Lenovo benefited from proactive follow-ups and support to ensure the Zendesk full migration stayed on track.
- **Historical Accuracy:** Every ticket, tag, and custom field was mapped to ensure data remained available for "future references."

Outcome & Result

1. **Operational Readiness:** Completed the enterprise Zendesk migration over a short period, allowing the Private Cloud team to resume operations instantly.
2. **Data Continuity:** Successful retention of all historical interactions, essential for Lenovo's long-term reference and analytics.
3. **Seamless Transition:** A "fast and simple" move that required minimal manual intervention from the Lenovo team.



Why Zendesk to Zendesk Migrations Happen

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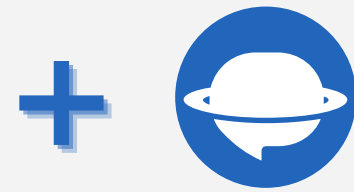
Lenovo: Migration Case Study

Airbyte: Migration Case Study

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Key Takeaways

Next step: Run a Free Demo Migration



Help Desk Migration

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Key Takeaways

Next step: Run a Free Demo Migration

Airbyte needed to migrate Zendesk to Zendesk to ingest historical data from a previous agency's instance into a new account to maintain the client's product backlog.

About the company

Airbyte is a UK-based digital product studio specializing in building mobile applications and websites. The company supports clients by developing, launching, and maintaining digital products, while also managing customer support workflows when required.

As part of a support transition project, Airbyte needed to assume full ownership of a client's Zendesk environment.



Ross Beale
Technical Director at Airbyte



Feedback

The migration went well; our support manager was on hand to personally ensure the process went smoothly for us. Everything was clear, and the sample migration helped us decide this was a product we could trust.



Airbyte



Computer Software



United Kingdom

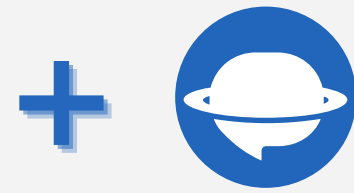
Data migrated:

- Tickets
- Contacts & Companies
- Agents
- Attachments & Notes
- Knowledge base

Migration option

- Automated Zendesk to Zendesk migration
- Demo Migration
- Ticket and knowledge base migration





Help Desk Migration

Migration Overview

Key Challenges

- **Operational Continuity:** Taking over support from another agency required a seamless Zendesk data restructure without losing existing customer threads.
- **Knowledge Retention:** The client relied on historical tickets to form their product development backlog; losing data meant losing the roadmap.
- **Technical Overhead:** Avoid the high cost and risk of writing a custom zendesk replatform script from scratch.

Help Desk Migration Solutions

- **Consultative Testing:** Iterative testing via the Demo Migration to build stakeholder confidence.
- **Responsive Support:** 24/7 technical assistance that bridged the gap between time zones.
- **The "Clean House" Approach:** A systematic 8-week project timeline involving data cleanup, automated field mapping, and post-migration optimization.

Outcome & Result

1. **Automated Migration:** The help desk migration solution replaced hours of manual coding with a streamlined, API-based transfer.
2. **Trust Through Testing:** A Zendesk demo migration allowed Airbyte to validate results before the Full Migration, ensuring the product was trustworthy.
3. **Support Accessibility:** Access to a dedicated support manager ensured the Zendesk environment migration was monitored personally.



Why Zendesk to Zendesk Migrations Happen

Zendesk to Zendesk Migration Guide

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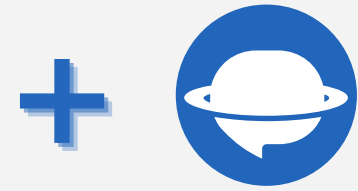
Lenovo: Migration Case Study

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Key Takeaways

Next step: Run a Free Demo Migration



Help Desk Migration

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Key Takeaways

Next step: Run a Free Demo Migration

After joining Oneflare, UrbanYou needed to migrate to a new Zendesk account to centralize support teams while retaining access to 200,000+ historical customer interactions.

About the company

UrbanYou is a technology-driven platform that allows customers to instantly book trusted, pre-screened household service professionals, including cleaners and gardeners.

Founded by Noga Edelstein and Elke Keeley, UrbanYou was built to simplify home service management through real-time booking technology. Despite being powered by digital systems, the company operates in highly trust-sensitive environments—customers' homes—making customer service history and data continuity critically important.



Noga Edelstein
Co-founder of UrbanYou



Feedback

Migrating our Zendesk data with Help Desk Migration was an absolutely seamless experience. We had a very complex case because we had over 200 000 tickets, and HDM just made it much easier. The support manager assisted us throughout the whole process and really walked us step by step.



UrbanYou



Household Services



Crows Nest, NSW, Australia

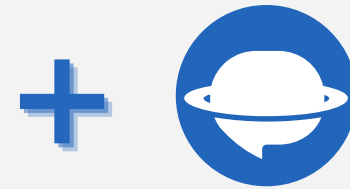
Data migrated:

- 200,000+ Tickets
- Contacts & Companies
- Agents
- Attachments & Notes
- Knowledge base

Migration option

- Free Demo Migration
- Historical ticket mapping
- Automated Zendesk to Zendesk migration





Help Desk Migration

Migration Overview

Key Challenges

- **Inadequate Alternatives:** Standard "data dumps" provided no detail; without a full migration, customer replies to old tickets would have vanished.
- **Massive Scale:** Moving 200,000 tickets and maintaining Zendesk data integrity across complex customer profiles.
- **Business Continuity:** As a "customer-service focused business," UrbanYou could not risk losing the trust established in their historical records.

Help Desk Migration Solutions

- **Step-by-Step Guidance:** Help Desk Migration provided a dedicated manager to walk the team through a high-stakes, two-phase transition.
- **Zendesk Recommended:** After consulting Zendesk directly, UrbanYou was referred to HDM to run their Zendesk to Zendesk migration.
- **Integrity Validation:** A Zendesk Demo Migration ensured that 15 years of professional standards were maintained during the automated move.

Outcome & Result

1. **Complete Record Retention:** Successfully moved the entire 200k ticket backlog, ensuring that old bookings and concerns remained actionable in the new instance.
2. **Seamless Consolidation:** UrbanYou and Oneflare achieved a unified support environment with zero loss of "people-first" service quality.
3. **Verified Data Integrity:** The UrbanYou team flipped the switch on a new account with 100% confidence in their historical data.



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Key Takeaways

Next step: Run a Free Demo Migration

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Why Zendesk to Zendesk
Migrations Happen

Zendesk to Zendesk
Migration Guide

Roland:
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Migration Case Study

Airbyte:
Migration Case Study

UrbanYou: Migration Case
Study

Key Takeaways

Next step: Run a Free
Demo Migration

Key Takeaways

A successful Zendesk migration case study shows that success relies on four pillars:



Clean before you move:

Treat migration as a filter, not a dump. Audit legacy tags and fields to ensure you only migrate to a new Zendesk account with high-quality, actionable data.



Prioritize automated integrity:

Replace manual scripts with a verified help desk migration solution. Automation ensures complex ticket threads, Help Center, automations, side conversations, and other records remain intact across 200,000+ records.



Validate it via a Free Demo Migration:

Use a Demo Migration to verify how specific ticket IDs and attachments appear in the target Zendesk environment. This builds stakeholder trust before the full cutover.



Plan the cutover window:

Execute the Zendesk Full Migration during low-traffic periods (e.g., weekends) to ensure zero impact on live customer support and global agent workflows.



Start Your Free Demo Today

Join thousands of companies that have ditched manual scripts for effortless automation.

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Have unique enterprise requirements? Our team is available 24/7 to help you build a custom migration roadmap tailored to your specific Zendesk configuration.

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