

# Help Desk Data Migration Checklist

86-point checklist across 7 phases - from ClonePartner (clonepartner.com)

Print this out, check off each item as you go, and share with your team. Every item matters.

## Phase 1: Discovery and Data Audit

■ 1	<b>Evaluate current help desk and document pain points</b>	Define what is broken, slow, or frustrating. These become your success criteria.
■ 2	<b>Define migration goals and measurable success criteria</b>	Set specific targets: reduce resolution time, support higher volume, enable multi-channel.
■ 3	<b>Identify all stakeholders and assign a single project owner</b>	One person owns the project end-to-end for accountability and decisions.
■ 4	<b>Complete a full data inventory across all object types</b>	Catalog tickets, contacts, orgs, KB articles, custom fields, tags, attachments, agents.
■ 5	<b>Capture exact record counts for every data object</b>	You need precise counts to validate after migration.
■ 6	<b>Map dependencies between data objects</b>	Know the import order: tickets depend on contacts, contacts link to orgs.
■ 7	<b>Run data profiling on source data</b>	Measure null rates, duplicate rates, orphan records, encoding anomalies.
■ 8	<b>Decide what to migrate, archive, or discard</b>	Spam, test data, duplicates, deprecated fields should not move.
■ 9	<b>Identify all custom fields, tags, and picklist values needing mapping</b>	Each needs a rule: 1-to-1 map, transform, or retire.
■ 10	<b>Document all active automations, triggers, macros, SLA policies</b>	These must be rebuilt manually. Document every condition and action.
■ 11	<b>List every third-party integration connected to current help desk</b>	CRM, billing, Slack, analytics, phone, chatbot. Each must be reconnected.

## Phase 2: Strategy and Planning

■ 12	<b>Select migration strategy: Big Bang, Phased, or Trickle</b>	Depends on downtime tolerance, data volume, and dependency complexity.
■ 13	<b>Create a RACI matrix for the migration project</b>	Responsible, Accountable, Consulted, Informed for each phase.
■ 14	<b>Define rollback criteria and rollback procedure</b>	Decide what failure looks like and how to reverse it before you start.
■ 15	<b>Set acceptable data variance and error rate thresholds</b>	Row parity $\geq 99.9\%$ , error rate $\leq 0.5\%$ , zero orphan records.
■ 16	<b>Build a detailed project timeline with milestones</b>	Assign calendar dates. Typical mid-market migration: 4-8 weeks.
■ 17	<b>Add a 15-20% contingency buffer to the timeline</b>	Every migration surfaces surprises. Build in buffer.
■ 18	<b>Create a migration budget covering all cost categories</b>	Subscription, migration labor, training, productivity dip, contingency.
■ 19	<b>Build a communication plan for every stage</b>	Who gets notified at each milestone? What are escalation paths?

■ 20	<b>Get formal stakeholder sign-off on strategy, timeline, and budget</b>	Written approval from sponsors, IT, and support management.
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### Phase 3: Data Preparation and Mapping

■ 21	<b>Clean source data: remove spam, test records, duplicates</b>	Run deduplication. Delete junk. Migrating dirty data defeats the purpose.
■ 22	<b>Merge duplicate contacts and organizations</b>	Same email, different names = split histories post-migration.
■ 23	<b>Archive tickets older than your retention policy</b>	Reduces volume, speeds migration, keeps new system clean.
■ 24	<b>Perform a full backup of your source system</b>	Export everything: database, attachments, KB, configuration.
■ 25	<b>Verify backup by restoring to an isolated test environment</b>	A backup you have not tested is not a backup.
■ 26	<b>Store backup in a secure, separate location</b>	S3, GCS, Azure Blob, or encrypted local drive. Not inside either platform.
■ 27	<b>Create a versioned field mapping document</b>	Source field -> target field -> transform rule for every field.
■ 28	<b>Document all data transformation logic in detail</b>	Concatenation, picklist conversion, date formats, JSON flattening.
■ 29	<b>Get field mapping reviewed by a business owner</b>	Engineers check technical. Business owners check operational sense.
■ 30	<b>Create a test dataset for pilot migration runs</b>	Include your most complex records, not the easiest.
■ 31	<b>Commit mapping specification to version control</b>	Track every change. Use Git or equivalent.

### Phase 4: Platform Setup and Configuration

■ 32	<b>Set up new help desk platform instance</b>	Account, subdomain, branding. Complete before any data import.
■ 33	<b>Configure user roles and permissions</b>	Admin, agent, supervisor, read-only. Map every user.
■ 34	<b>Recreate all custom fields, tags, statuses, picklist values</b>	Must exist in target before import. Missing fields = silent data loss.
■ 35	<b>Rebuild automation rules, triggers, workflows, macros</b>	Cannot be migrated as data. Test each individually.
■ 36	<b>Rebuild SLA policies and escalation rules</b>	Response times, escalation paths, business hours.
■ 37	<b>Configure email channels with proper DNS records</b>	SPF, DKIM, DMARC. Incorrect config = missing tickets on day one.
■ 38	<b>Configure chat, messaging, and social media channels</b>	Each channel may need separate routing configuration.
■ 39	<b>Set up all third-party integrations</b>	Regenerate API keys/OAuth tokens for new platform.
■ 40	<b>Create all agent accounts and verify login access</b>	Every agent logs in 48 hours before go-live.
■ 41	<b>Distribute training materials and quick-reference guides</b>	One-page cheat sheets for common tasks.

■ 42	<b>Hold training sessions or office hours for agents</b>	At least one hands-on session plus open Q&A.;
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## Phase 5: Sample Migration and Pilot Testing

■ 43	<b>Run a sample migration on test dataset</b>	Start with the hardest records. If they work, the rest will.
■ 44	<b>Validate ticket threading and conversation integrity</b>	Threads in correct order: customer, agent, internal notes.
■ 45	<b>Validate custom field values and tag mappings</b>	Spot-check transformed values. No blanks or 'Unknown.'
■ 46	<b>Verify all attachments transferred and are openable</b>	Files present AND openable. Silent failures are common.
■ 47	<b>Verify historical timestamps are preserved</b>	Created On / Modified By = original dates, not migration date.
■ 48	<b>Verify relational integrity between objects</b>	Tickets to contacts, contacts to orgs. Zero orphans.
■ 49	<b>Check encoding: special characters, emoji, multi-byte strings</b>	Verify correct display in target system.
■ 50	<b>Measure row parity: source vs target counts per object</b>	Any discrepancy must be investigated before proceeding.
■ 51	<b>Test the rollback procedure on sample data</b>	Purge test data from target. Verify source unaffected.
■ 52	<b>Run additional sample migrations until all issues resolved</b>	Iterate until every known issue is fixed.
■ 53	<b>Document all issues found and fixes applied</b>	Log what went wrong, root cause, and resolution.

## Phase 6: Go-Live Cutover Execution

■ 54	<b>Announce code and config freeze on both platforms (48hrs before)</b>	No deployments, workflow changes, or permission edits.
■ 55	<b>Revoke write access on both systems during freeze</b>	Read-only for admin/developer roles.
■ 56	<b>Hold final Go/No-Go meeting - unanimous approval required</b>	Any unresolved concern = No-Go.
■ 57	<b>Perform final full backup of source system</b>	Last safety net before cutover.
■ 58	<b>Verify final backup with a partial restore test</b>	Not corrupted, restorable.
■ 59	<b>Execute bulk data migration</b>	Monitor rows processed, failed, errors, throughput.
■ 60	<b>Monitor migration progress and error logs in real time</b>	Watch for 429, 413, 422 errors.
■ 61	<b>Place old help desk in read-only mode</b>	Disable email, API, chat, portal on source.
■ 62	<b>Post read-only banner in old system UI</b>	Inform agents. Link to new system.
■ 63	<b>Execute final delta migration</b>	Catch-up of all data since bulk migration started.
■ 64	<b>Run post-delta validation checks</b>	Row parity, aggregates, checksums, referential integrity.
■ 65	<b>Re-point DNS and all channels to new system</b>	Email, MX, chat widgets, webhooks, portal.
■ 66	<b>Enable notifications and automations in new system</b>	Only AFTER validation. Premature = chaos.

■ 67	<b>Re-establish and test all third-party integrations</b>	Send test data through each one.
■ 68	<b>Send test messages through every support channel</b>	Email, chat, portal. Confirm ticket creation and routing.

## Phase 7: Post-Migration QA and Hypercare

■ 69	<b>Spot-check ticket data from different time periods</b>	Last week, last month, last year, 2+ years ago.
■ 70	<b>Verify contact and organization records</b>	Names, emails, phones, org links, custom fields.
■ 71	<b>Verify knowledge base articles</b>	Content, formatting, images, categories, URLs.
■ 72	<b>Verify attachment and file integrity</b>	Open samples. Correct files, not corrupted.
■ 73	<b>Test automation and trigger execution end-to-end</b>	Create test ticket. Verify everything fires.
■ 74	<b>Test SLA policies and escalation rules</b>	Timers, business hours, escalation thresholds.
■ 75	<b>Test all support channels end-to-end</b>	Real email, chat, portal through full lifecycle.
■ 76	<b>Have 2-3 agents complete a full workflow walkthrough</b>	Pick up, reply, note, assign, resolve, close.
■ 77	<b>Test customer portal</b>	Submit ticket, view history, search KB as customer.
■ 78	<b>Validate reporting dashboards and historical analytics</b>	Dashboards work. Historical numbers accurate.
■ 79	<b>Benchmark performance against pre-migration baseline</b>	Page load, API, search. Target: +/-20%.
■ 80	<b>Audit user roles, permissions, and security settings</b>	Correct roles, no over-permissioned users.
■ 81	<b>Set up war room or Slack channel for hypercare</b>	Single place for issue triage. Staff it.
■ 82	<b>Send company-wide go-live communication</b>	Links to new system and quick-reference guides.
■ 83	<b>Monitor errors, latency, missing records for 48-168 hours</b>	Error <0.5%, latency +/-20%, missing = 0.
■ 84	<b>Gather real-time agent feedback daily</b>	What is not working? What is confusing?
■ 85	<b>Hold post-mortem review and document lessons learned</b>	What went well, wrong, differently next time.
■ 86	<b>Begin decommissioning old system</b>	Archive, wipe, terminate subscription, update CMDB.