

# The Essential Data Migration Checklist

STACK MOXIE 

# Before Migration

## *Data Points to Collect*

### Baseline Performance Metrics

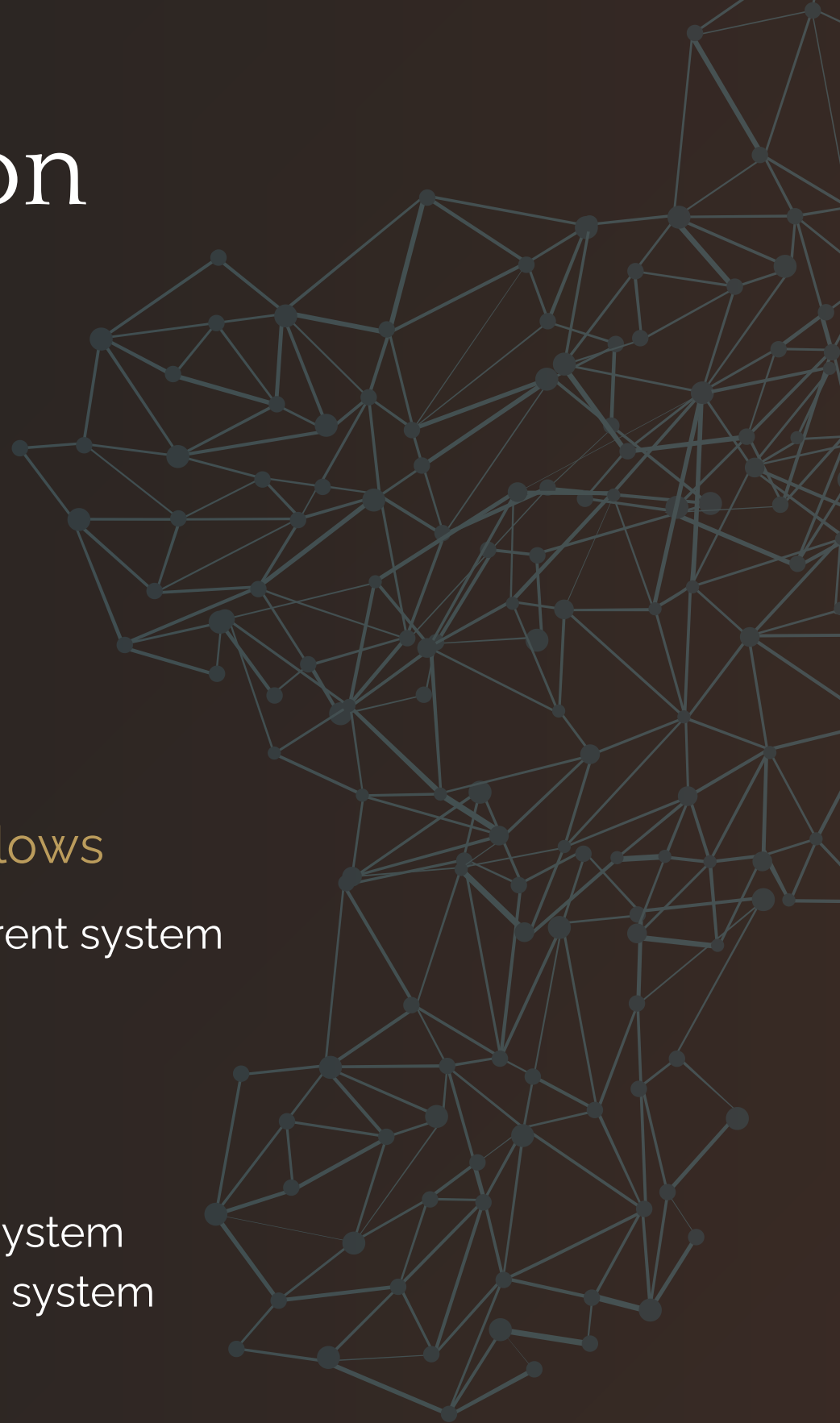
- Speed to lead time
- Page load times
- System response times
- Current conversion rates
- Other relevant KPIs

### Inventory of Assets and Workflows

- List of all digital assets in the current system
  - Web pages
  - Forms
  - Emails
  - Landing pages
- List of workflows in the current system
- List of automations in the current system

### Error Logs and Issues

- Review of recent error logs or known issues with the current setup that need to be addressed during migration.



# Before Migration

## *Questions to Ask*

### All Teams

- Why are you migrating now?
- What are your main goals and objectives for this migration?
- Are there specific challenges with your current system that you're aiming to overcome?
- RACI framework roles

### Marketing & Revenue Operations

- How do you currently track and measure performance?
- Are there specific workflows or automations that are critical to your operations?

### Web Team

- Are there specific technical constraints or requirements for the new platform?
- How do you currently manage SEO and ensure site accessibility?

### Demand Generation

- What are your key conversion points and how are they tracked?
- How do you foresee the migration impacting your campaigns?

# During Migration

## *Data Points to Collect*

### Real-Time Performance Monitoring

- System response times
- Page load times
- Any errors that occur during the migration

### Migration Logs

- Detailed logs of the migration process
  - Time stamps, actions taken, any issues encountered, etc.

### User Feedback

- Collect feedback from internal users testing the new system during the migration for immediate issues.



# During Migration

## *Questions to Ask*

### All Teams

- How is the migration impacting your daily operations?
- Are there immediate concerns or issues that need to be addressed?

### Web Team

- Are redirects functioning as expected?
- Are all assets and pages displaying correctly in the new environment?



# After Migration

## *Data Points to Collect*

### Post-Migration Performance Metrics

- Speed to lead time
- Page load times
- Conversion rates
- Other relevant metrics compared to baseline

### Error Logs and Resolved Issues

- Compilation of any errors encountered post-migration and the solutions implemented

### User Satisfaction

- Feedback from all teams on the new system's performance and usability



# After Migration

## *Questions to Ask*

### All Teams

- Did the migration meet your initial objectives and goals?
- Are there any outstanding issues or unmet needs?

### Marketing & Revenue Operations

- How has the migration impacted your tracking and measurement capabilities?
- Are there any improvements or declines in workflow efficiency?

### Demand Generation Team

- Has there been any impact on your conversion rates or campaign performance post-migration?
- What adjustments have you had to make in your strategy as a result of the migration?



# Type-Specific Considerations

## Website/CMS Migrations

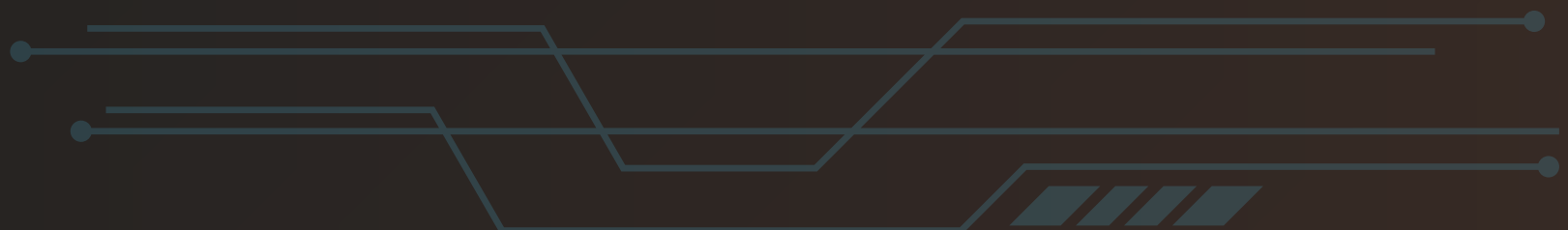
- Ensure all URLs are functioning, SEO settings are migrated properly, and content is displaying as expected

## CRM Migrations

- Confirm that all customer data has been accurately transferred and that custom fields and workflows are functioning as intended

## MAP Migrations

- Verify that all marketing automations are active and performing correctly, and that data integration with other systems (like CRMs) is seamless





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