CHECKLIST FOR MIGRATING DATA TO NEW SOFTWARE

As law firms change their office systems and procedures, they may need to migrate or transfer data between software programs. Data migration involves exporting data from the existing program and importing that same set of data into the new program. This process can be daunting as it involves many considerations and advanced planning. Use this checklist to prepare for the migration to minimize mistakes and unnecessary manual data entry.

What data needs to be migrated will depend on the changes in software that the firm is contemplating. For example, switching from one practice management software program to another may require moving multiple types of client files and information and firm administrative data from one program to another. Alternatively, switching to a standalone timekeeping and billing software program may only involve the movement of certain client contact and financial information. Understanding what data is involved will help make the migration more manageable.

Identify What Data to Migrate, What Format, and Who Will Do It

1. Know where your data is stored – If your existing program is a premise-based program that you downloaded to your server, then the data is on your server. If it's a cloud-based program, then your data is stored in the cloud by the vendor. The location of data is important to determine what needs to happen to that data after it's migrated to your new program.
2. Know which data you want to migrate to the new program – Your existing program may contain data that you do not currently need or want to transfer over. Identifying which specific data you want will help cut down the migration time and process.
3. Know the current format of the data – The format affects how data can be exported and imported between programs. For example, the CSV format is often used for migrating data between programs because it is a plain text file that contains a list of data separated by commas. The new program may require a specific format to be imported, so check with the vendor about any requirements ahead of time.
4. Determine who will export and import your data – If your current program is still supported by the manufacturer, it's best to contact their customer service for assistance in exporting your data. If your program is no longer supported (as in the case of many premise-based programs), consider contacting the customer service department of your new program to assist with data migration. When contacting the new vendor, consider asking them the following questions:
    a. Who and What – Will they migrate data for you? How much of your data will be migrated over to the new program? Is it 100% or 75%? What data will and will not be migrated over? Is there a contact person who will oversee the data migration?
    b. Cost – Is the data migration free of charge or is it an added cost? If so, how much?
    c. Support – If you must migrate some or all of the data yourself, what support will the vendor provide?
    d. Time – How long will the migration process take?
    e. Repairs – What happens if mistakes occur during the migration process? Who will fix the mistakes?
5. Know what to do if you are doing the migration yourself. Make sure you understand the technical process or get IT support to ensure a smooth migration.

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Prepare for the Migration

6. Review and clean up the data in your existing program – Are there duplicate entries of the same information? Is there information that can be deleted? Cleaning up your data will help reduce the amount of unnecessary data that will be transferred to the new program.
7. Backup – Keep a separate and accessible backup of all data before starting the migration process.
8. Determine how long the migration will take – If the vendor is involved in the data migration process, you should have a rough estimate of the timeframe. If you're doing the data migration yourself, map out a timeline as to when you will export data from the existing program, when you will import it, and overestimate how long each process will take.
9. Determine a proper go-live date that works with your firm's operations – Consider scheduling the migration for the end of a regular billing period so you can start the next cycle within the new system.
10. Make sure your team is trained in how to use the new software – Determine if the new program has an option for formal training as part of the package. If not, find out from customer support what training resources are available.

During the Migration

11. Migrate data all at once to prevent data loss and other issues – The migration may not happen in one sitting, depending on the amount of data being transferred. Be prepared for any downtime that may arise during a longer migration process.
12. Have an IT support person available – After speaking with the new vendor about IT support during the migration process, if support from the vendor isn't sufficient, consider enlisting separate IT support. If your IT person isn't familiar with the software, some programs provide third-party IT consultants.

After the Migration

13. Do not completely shut down your old program yet – Have your old program accessible until you are sure the new program is up and running. Provide the necessary "lead time" to work out issues before using the new program.
14. Ensure all information has been properly migrated – Compare it to the previous data to be sure no errors or omissions occurred during the migration. If financial data is migrated, speak to your bookkeeper so they can compare the data and fix any errors.
15. Debrief with the vendor of the new program – If there are errors or omissions that occurred during the migration, speak to your new vendor to determine if they can assist in resolving those issues.
16. Shut down your old program – Cancel your existing cloud-based program or decommission your premise-based program once you're assured that all necessary data has been properly migrated and the new program is working as expected.

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IMPORTANT NOTICES