Optimizing Data Migration Part 1: Define and Support Your Team

by Barbara Schick and Zachary Segundo

Data migration is complicated. When companies underestimate the attention and planning required, strategic enterprise-wide initiatives like product lifecycle management (PLM) implementations can be badly derailed. Schedules slip, go-live dates are missed and additional resources are required to get back on track while keeping sponsors happy and teams motivated.

Why does this happen over and over? While data migration is almost always included in an implementation project plan, its importance is often underestimated as a simple matter of shifting data from one place to another via a mundane, administrative process. It’s generally defined late in the project timeline and rarely gets adequate attention early enough in the process to prepare for effective execution. Project teams focus on technology selection, design sessions and configuration, leaving migration planning until very late in the game. Already starting to feel the crunch of the go-live date, migration plans frequently miscalculate the true timing and resources required to complete everything on time.

It doesn’t have to be this way. By answering the following questions, you can help avoid the delays and headaches that plague many initiatives.

1. **Who is the data migration team?**
2. **Are migration expectations clear to the business?**
3. **Is the team prepared to execute against the plan?**

Over the next few weeks, we’ll outline these questions and discuss leading practices for each. The answers will help you lead your team around common data migration pitfalls with a thoughtful and well-executed plan.

**Question One: Who is the Data Migration Team?**

Companies that build a foundation of resources and empower them to get the job done will be more successful. To adequately answer this first question, you’ll need to clearly define roles and responsibilities, and make a plan for how you will select the team and support them through the project.

**Six Essential Data Migration Roles and Responsibilities**

When building the dedicated data migration team, there are six distinct roles that must be established:

<table>
<thead>
<tr>
<th>Roles</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>Business data migration lead</td>
<td>Oversee the migration process from a business perspective</td>
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<td></td>
<td>Coordinate between divisional leads, process managers and project managers</td>
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<td></td>
<td>Perform business validation of uploaded data</td>
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<tr>
<td>Subject matter experts</td>
<td>Lend expertise to cleansing of data and build data governance</td>
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<td></td>
<td>Cleanse and complete data</td>
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<td>Data extraction/ upload lead (IT)</td>
<td>Extract data from legacy system(s)</td>
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<td></td>
<td>Initiate/monitor upload processes</td>
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<td></td>
<td>Perform technical validation of uploaded data</td>
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<tr>
<td>Data entry clerk(s)</td>
<td>Obtain, process and transform data</td>
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<td></td>
<td>Apply data governance rules</td>
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<td></td>
<td>Coordinate with subject matter experts on data cleansing</td>
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**Select the Data Migration Team**

While each of these six roles is essential to a well-functioning team, requirements vary in terms of the level of internal knowledge and ongoing involvement in data migration activities. The first four roles are usually filled internally and require only part-time commitments. Data entry clerk(s) and the data migration process manager are full time roles that are usually filled by resources external to the business. The data entry
clerk role is administrative and does not require intimate business process or organizational knowledge, whereas the process manager role is typically filled by the system implementer.

Ensure Adequate IT Support

If data migration is going to span multiple divisions of a company, it may be necessary to identify resources within each division. Regardless, there must be a single set of management resources to monitor the progress of the project and coordinate the work.

While a single IT Lead role is defined, it is likely that many members of the IT organization will be involved in supporting migration efforts. IT resources perform data extracts and uploads, and are frequently needed for one-off requests. The data migration process manager should work with IT leadership to identify the IT resources that will be available throughout the project.

Once IT resources are identified, the process manager should get to know them early in the process to understand who the principals are and where their strengths lie. Knowledge of who understands the current database structure, who understands the future database structure and who writes SQL queries in their sleep will make future requests easier to manage and direct.

If IT does not have the skill sets or time necessary to devote resources to data migration, project management should work with the overall project leadership to identify any external resources available to assist with the data migration.

Parts two and three of this series will cover the development of clear migration expectations for the business and preparing the team to execute against the plan.

Read More

Optimizing Data Migration Part 2: Align with Business Expectations

Optimizing Data Migration Part 3: Prepare to Execute

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