Optimizing Data Migration Part 3: Prepare to Execute

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.

In our last two entries of this series, we answered two pressing questions with tips designed to help companies optimize data migration. (See Define and Support Your Team and Align with Business Expectations).

Question Three: Is the Team Prepared to Execute Against the Plan?

With the team defined and the business bought-in to the migration plan, it's time to make sure the team has everything they need to execute, including data migration training and tools, as well as an open communication environment.

Provide Data Migration Training and Tools

With system implementations, most businesses establish new processes and governance rules to be enforced by the new software. Data migration activities often provide the business' first opportunity to work with these guidelines. However, because data cleansing and transformation starts early, external tools and templates are frequently used while the system is under development.

Migration Templates

Migration templates serve a dual purpose, initially used during cleansing efforts while preparing data, and subsequently used for uploading data to the new system. Template development requires intimate knowledge of the future-state system design. The Process Manager should build the migration templates to match the to-be design, including list options and validation rules to meet the newest governance standards. There should be a kick-off meeting when delivering templates to the team, in which the Process Manager trains team members on the reasoning behind and significance of data changes from current sources. The Process Manager should also explain how the migration template can help transform existing data to meet new requirements.

Graphical Instructions

For ongoing support, the Process Manager should provide comprehensive instructions containing images of the system. Like the introduction to migration templates, these reference materials should describe how to use the template to identify and cleanse data to match data governance rules and guidelines. Embedded visual elements like screen shots of the configured to-be system design and comparative before and after images will both familiarize business users with the system and demonstrate differences in data transformed from legacy systems.

Provide an Open Communication Environment

In addition to training and tools, constant and open dialogue is essential. From the beginning, an avenue for communication should be available for everyone from the data entry clerk to overall project leadership (and everyone in between). Egos should be checked at the door and all players should be willing and encouraged to share and accept praise and critiques, and to compromise throughout the process. Data migration is a marathon. Open communication will help everyone reach the finish line a little faster.

Is there such thing as a flawless data migration? Probably not. But by considering the questions and answers from this three-part series you will be able to lead your implementation team around pitfalls with a thoughtful and well executed plan.

Read More

Optimizing Data Migration Part 1: Define and Support Your Team

Optimizing Data Migration Part 2: Align with Business Expectations

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