Taurus Software
Making Data Liquid

Top 10
Migration Tips

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C ongratulations on selecting a new application! There are many different reasons for selecting a new application: technological advancements, new industry standards, or new business requirements. No matter which reason was your driving factor, implementation must happen quickly and correctly with as little impact to the business and your customers as possible.

It's helpful to identify potential issues that make migrating to a new application challenging.

In interviews with our existing customers, companies have said:

"When we started, we didn't know what we didn't know." The new application uses different rules and processes than your current application. You shouldn't assume that it can do everything that you are doing in exactly the same way. In fact, you will find that it probably doesn't do everything and most things are done differently.

"It was much more time consuming than I thought," and **"Everything took longer than we thought it would."** Many factors contribute to this issue, beyond planning. Here are the top three:

- Not one of your employees is sitting around with eight hours of free time each day. While some may have available time, they have normal job tasks. They are doing those tasks from a position of knowledge gained from the experience of doing their job using the tools you provided. Now, employees have new tools, new or different tasks, and the same amount of work they had before.

- Switching software applications is typically done to accommodate change that you want to make to business processes, or to fill gaps. This usually means new business rules and processes, new data, new policies, and new standards. Developing and refining these takes time and normally involves more than one person or department.

- The initial plan didn't include all the steps needed, timing was inadequate or misunderstood, or allocated resource requirements were inadequate.

"After going live, tracking goals and making decisions was more of an issue than we thought." Much of the effort of application implementation is the go-live. The application vendor and your company want the application in use as quickly as possible. The sooner that happens, the more quickly the busi-ness can begin to get their return on investment. After the go-live however, many find that necessary reporting can't be reproduced, or can't be produced in a similar manner. Data doesn't align; there is no historical data; the reports were generated using a data source that no longer exists, with a paradigm that is no longer relevant.

"Setting up data and getting data into the application was easy and hard, all the same time." Although the majority of application vendors provide a way to import the basic data needed by the application, most have restrictions about what kind of data they will import. Many times historical data import is not supported through standard import processes. Though customized data fields may be added to your new environment to support your needs, this can result in extra work and extra time for the migration effort.

So what can you do to make the process easier and more effective?
Here's a short list:

1 **Better planning yields better results.** Ensure that the migration team has representation from each of the major functional groups in the organization. Include data migration in the overall plan. Be prepared: data loading is an iterative process. Requirements will change and you will need to load again. The cycle may repeat a number of times. Include management of historical data in the plan. Make sure your auditor's and customers' questions can be answered quickly and easily.

2 **Review new procedures for all your key business processes ASAP.** Gaps will certainly exist. The sooner they are identified, the better. Become educated on current business functions and processes. Then, evaluate the corresponding functionality in the new application. This will enable your business users to guide the migration process and ensure a successful go-live. Be an honorary member of Missouri, the "show me" state! Make sure you see it happen.

3 **Understand what it is going to take to service your customers and vendors during the transition.** How are you going to answer questions about customer orders or purchase orders that are in process? Reschedule delivery? Process returns?

Help customers reorder a past order? There are many strategies which can help bridge the gap to historical data. Before you can implement the right strategy, you need to know what the business deems a reasonable response to customers and vendors.

4 **Decide if it's time to make some changes to your data coding to align it with the functionality and paradigm of the new application.** Through the years of using your old application, you may have adjusted to changes in your business and the marketplace by using work-arounds. Take time to make sure the approach you use to organize your products, customer attributes, vendors, and other data objects align with the paradigm of the new application.

5 **Identify the historical data you will need.** Historical information is required for financial audits, recalls, returns, and customer service. Beyond those obvious uses, most companies use historical performance data as a comparative data point to current production. Historical data is also used for planning. There are three main choices used to solve this issue: 1) create a data warehouse to contain historical and current information; 2) transfer historical data into the new application; and 3) archive historical data. Not all data is equal, so one needn't use the same solution for all of the historical data.

6 **Find the right tools to move data.** Users know your data best. So as you start looking for a software tool to move the data,

look for a low-code or no code solution. This will allow users to be directly involved with the migration of data. If this is your first migration, choose a software vendor that has experience and can support you through the migration — a company that understands your marketplace and terminology.

7

Test, test, test, and test some more. Migration testing should be performed long before the migration is complete. Testing should be performed from the beginning of the migration process. This gives you time to identify and make needed changes. Being able to erase the data in the environment and reload will be an essential component of your testing. You may find that having more than one sandbox will serve the migration teams best. Each test should be automated, have a specific expected result, and have automated result verification.

8

Account for customizations. Many applications allow new fields, objects, rules, and interfaces to be added easily and at the direction and effort of the application users. Customized data will need to be loaded. This new data may affect functionality of the new application. It is important to keep the data migration team in the loop for these customizations. You don't want to get to the go-live date and realize no one has a migration process for the new fields/objects or that new rules and functionality don't allow data to be migrated.

9

Learn from past trailblazers. In most cases, others will have gone through the migration process before you. Not being

first means that there are others that have done this before you. Reach out to the user community and take advantage of the experiences of others. Work with vendors that perform migrations regularly. Call upon your company's internal resources that have been involved in successful migrations in the past. The migration journey is one you should never take alone.

10 **Have your own project manager.** Your organization is going to depend on the functionality of this new application. You need someone who is looking after the company's goals and interests during the implementation and migration. The project manager should be intimately familiar with the old application, should know the business well, and should understand the motivation for moving to the new application. Migrations are complicated and time consuming. Someone needs to watch the process to ensure a successful migration. If you don't have an experienced project manager, contract one who will advocate for you and your organization.

Taurus has been Making Data Liquid since 1987 with over 700 customers world-wide. Our products are the fastest, easiest way to select, extract, manipulate, profile, clean, and move data between platforms, to synchronize applications, populate data warehouses, build data marts, migrate data cross-platform, and integrate production environments. Learn more at https://taurus.com.

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