ITSM Migration Checklist

Thank you for downloading the ITSM migration checklist! Use this to guide your team through the ITSM migration process: from identifying what needs to change, all the way to go-live and post-launch support.

People involved   **Due date**

1 Gap assessment

Evaluate where your current ITSM setup falls short.

- [ ] Document current ITSM processes (ticket flow, approvals, categories).
- [ ] Identify manual steps and recurring user complaints.
- [ ] Map key integrations and their purpose (e.g., monitoring tools, HRIS, asset inventory).
- [ ] Assess process maturity (e.g., ad hoc, repeatable, optimized).
- [ ] Run a gap analysis: compare current capabilities to desired outcomes.
- [ ] Define the main reasons for migration (e.g., performance, flexibility, cost).

Optional deliverable: Summarized gap report for stakeholders.

2 Requirements definition

Clarify what you'll need in the new platform.

- Define project scope
  (teams, processes, geographies).

- List core functions needed.

- Document integration needs
  (e.g., SSO, LDAP, APIs, third-party apps).

- Identify automation priorities.

- Clarify performance expectations and
  admin flexibility (e.g., no-code setup).

- Align internally on what can be
  standardized vs. customized.

Optional deliverable: Requirements list or checklist.

3 Vendor evaluation

Shortlist and select a tool that meets your
defined needs.

- Translate needs into an RFP or structured
  evaluation checklist.

- Identify and contact potential vendors.

- Schedule demos using real or common
  scenarios.

- Assess vendor fit based on functionality,
  usability, support, and roadmap.

- Validate references or case studies
  (if possible, from a similar org size or industry).

- Compare pricing models and licensing terms.

- Finalize selection and define
  implementation timeline.

4 Phased migration planning

Break the migration into smaller, controlled phases.

- Decide on your rollout approach (e.g., by team, process, or geography).
- Set success criteria for each phase.
- Coordinate with business units to avoid overlaps with peak periods.
- Create a cut-over calendar (what moves when).
- Prepare sandbox or staging environments for testing.
- Define change freezes and data migration windows.
- Plan communication checkpoints (internal updates, stakeholder sessions).

Optional deliverable: Migration rollout calendar.

5 Implementation

Move processes, data, and configurations into the new system.

- Clean up outdated or redundant data before migration.
- Define data mapping rules (e.g., status types, user fields, SLAs).
- Run test migrations in a sandbox and validate record accuracy.
- Recreate workflows, automation, and notifications.
- Configure service catalogs, request forms, and access rules.
- Rebuild integrations (email, user provisioning, monitoring, asset tools).
- Run user acceptance tests (UAT) for critical paths.
- Finalize dashboards, SLAs, and reports for go-live.

6 Training, cut-over & early support

Prepare users, transition to the new system, and stabilize.

- [ ] Deliver training by role (support agents, team leads, requesters).
- [ ] Provide quick reference materials or internal guides.
- [ ] Announce go-live schedule and support resources internally.
- [ ] Freeze changes in the legacy platform and perform final migration.
- [ ] Launch the new system during the planned cut-over window.
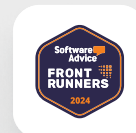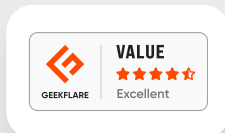- [ ] Monitor adoption, ticket flow, and agent feedback in real time.
- [ ] Capture any issues in a hypercare period (first 1–2 weeks post go-live).
- [ ] Run a review to gather lessons learned and next steps.

Optional deliverable: Internal training materials, go-live checklist, post-migration

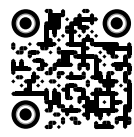**InvGate Service Management**

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Product Tour

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● Subtask   ✓ Deliverables

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