

# Remedyforce Migration Strategy Checklist

Preparing for a transition from Remedyforce requires a comprehensive migration strategy, here are the essential steps to include in your plan



## STEP 1 Assessment Phase

- Inventory Analysis**  
Identify all Remedyforce functionalities, customizations, and dependencies
- User Needs Assessment**  
Understand user requirements and pain points for the new solution
- Data Audit**  
Evaluate data for migration, archiving, or deletion



## STEP 2 Solution Selection

- Research Alternatives**  
Explore replacement options like ServiceNow, Freshworks, Jira Service Management, etc.
- Vendor Evaluation**  
Assess potential vendors based on features, scalability, integration, support, and cost
- Budget Planning**  
Determine migration costs, including software licensing, design, implementation, migration, training, and customization



## STEP 3 Data Migration

- Data Mapping**  
Map data fields, structures, and relationships between Remedyforce and new solution
- Data Cleansing**  
Clean and standardize data to ensure accuracy before migration
- Migration Plan**  
Develop a step-by-step plan for migrating data, sequencing go-lives, and handling transformations



## STEP 4 Customization and Integration

- Custom Process Review**  
Explore replacement options like ServiceNow, Freshworks, Jira Service Management, etc.  
Evaluate existing workflows and target new workflows; decide what to replicate, modify, or remove
- Integration Strategy**  
Plan integration with other tools/systems; ensure a smooth transition



### STEP 5

## User Training

- Training Program**  
Create comprehensive training for users, administrators, and stakeholders
- Documentation**  
Develop user guides and FAQs for effective system navigation



### STEP 6

## Testing

- Testing Environment**  
Set up a controlled environment to test data, customizations, and integrations
- User Acceptance Testing (UAT)**  
Involve end-users to identify issues and ensure the system meets requirements



### STEP 7

## Communication

- Stakeholder Communication**  
Keep stakeholders informed about progress, timeline, and potential disruptions
- Change Management**  
Develop a plan to manage resistance and expectations during the transition



### STEP 8

## Go-Live and Post-Migration

- Go-Live Plan**  
Plan the actual migration process and transition to the new system
- Post-Migration Support**  
Provide support for users immediately after migration
- Monitoring and Optimization**  
Continuously monitor system performance and gather user feedback



### STEP 9

## Backup and Contingency

- Backup Plan**  
Prepare a backup strategy and ensure critical data is backed up
- Rollback Plan**  
Establish a plan to revert to the old system if needed

## Conclusion

Emphasize the significance of a well-structured migration strategy for a successful transition away from Remedyforce.