Checklist: Building Your Content Migration Plan

Successful migration to a new EXP or employee app relies largely on planning and strategy. Using this checklist can help guide you through the process of creating a content migration plan that fully considers your needs, available resources, and internal and external deadlines – while also helping you identify the best solution available to support your goals.

Assess your needs:

- ☑ Outline worker types and accessibility requirements
- ☑ Consider security needs and vendor capabilities and certifications
- ☑ Evaluate the available customer support (types, availability, response times, etc)
- ☑ Get clarity around your budget
- ☑ Peruse user reviews and customer case studies
- ☑ Look at personalization options and features
- ☑ Learn about integrations available for your other systems

Using this criteria, evaluate potential vendors carefully and look for a partner who offers industry expertise and experience to help guide you through your migration process.

Steps to include in your migration strategy:

- ☑ Evaluate current content inventory
- ☑ Perform a content audit
- ☑ Identify opportunities to update/improve content, make more user-friendly
- ☑ Create a vision or wishlist for your new EXP
- ☑ Form a task force to perform content migration
- ☑ Keep track of migration progress (find a spreadsheet lover and put them in charge of this)
- ☑ Proofread all content assets during migration
- ☑ Launch to employees!

Launch steps to consider:

- ☑ Before migration, let employees know a new EXP is coming soon
- ☑ Before migration, poll employees about desired content for the new EXP
- ☑ After migration, host informational sessions/ trainings as needed to introduce employees to new EXP
- ☑ After migration, make it easy for employees to get assistance with EXP if needed (e.g. designate a support person or email)

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