

ITSM migration checklist: 10 points for a move without surprises

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The points our consultants check on every ITSM migration, whichever tool you leave and whichever you move to. Give each one an owner and a date, and tick it when it is done. Anything still open when the test load starts is a risk to discuss.

1. Decide

	Owner	Due date
☐ A clear reason to move, and a target tool chosen against your requirements The problems the move must solve, written down, and checked against the target tool, not only against its demo.		
☐ The end date of your current contract, and a cutover date well before it Notice period included, with enough margin that you never pay two tools for long or end up without one.		
☐ A decision on history: what to migrate, what to archive For example, open tickets and recent history migrated, older records kept in a searchable export.		

2. Prepare

	Owner	Due date
☐ An inventory of integrations, automations and reports in the old tool Each one listed with its owner and a decision: rebuilt, replaced or dropped.		
☐ A field and status mapping signed off by the process owners Old values to new ones, field by field, including categories, priorities and custom fields.		
☐ Knowledge articles cleaned before they move, not after Outdated articles archived, duplicates merged and an owner for every article that moves.		

3. Test and cut over

	Owner	Due date
☐ At least one full test load, reconciled by counts and samples Record counts compared per object, and samples of tickets, attachments and links checked end to end.		
☐ A parallel run plan and a fallback option How long both tools run side by side, who works where, and what triggers a roll-back.		
☐ Agent training and user communication scheduled before cutover Agents trained on the new tool; users told what changes, when, and where to go for help.		

4. After the move

	Owner	Due date
☐ The old tool kept read-only for audits and look-ups Read access or a complete export kept for as long as your retention rules require.		

Planning a migration?

SMC Consulting migrates tickets, knowledge, CMDB data and workflows between ITSM platforms, with a parallel run and a fallback plan. Start with a free 30-minute ITSM audit: what to move, what to leave behind and when to cut over.

[Book my free ITSM audit →](#)