Seattle .dev

FREE PLAYBOOK

The 4-Phase Data Migration Playbook

Migrate systems without losing history, breaking workflows, or causing downtime.

Tim Mushen — Seattle.dev

Free resource — 2026

seattle.dev/downloads/data-migration-playbook.pdf

PLAYBOOK

The 4-Phase Data Migration Playbook

Migrating between business systems is the most underestimated project in custom software. Done badly, it loses data, breaks workflows, and burns trust. Done right, it's invisible. This playbook is the 4-phase process I use to make it boring.

ON THIS PAGE

1 Audit

Goal: know exactly what you're moving before you decide how.

Key questions:

- What systems hold the data we care about?
- What's the volume per record type (rows, attachments, history)?
- Which data is critical vs nice-to-have vs archival?
- What dependencies exist between records (foreign keys, related items)?
- Where are the legal/compliance landmines (PII, financial, regulated)?

Success criteria: A complete data inventory with classification (critical / important / archival) and dependency map. No "we'll figure it out during migration."

2 Plan

Goal: define the target structure, mapping rules, and rollback strategy before touching data.

Key questions:

- How does the target system want the data shaped?
- Where do source fields map cleanly, and where do they need transformation?
- What happens to records that don't have a clean home in the target?
- What's the rollback plan if the migration corrupts data?
- When do we cut over — weekend, overnight, parallel run?

Success criteria: A field-by-field mapping document, a tested rollback procedure, and a cutover timeline approved by all stakeholders.

3 Migrate

Goal: move the data with checkpoints, not in one heroic push.

Key questions:

- Are we running parallel (old + new live) or cutover (freeze old)?
- How are we handling partial failures?
- Who has the authority to abort if something goes wrong?
- What's the communication channel during the migration window?

Success criteria: Data lands in target system per mapping spec. Rollback procedure tested and ready. Stakeholders notified at each checkpoint.

4 Validate

Goal: prove the new system is the source of truth before you turn off the old one.

Key questions:

- Do record counts match (per table / per category)?
- Do totals reconcile (revenue, counts, sums)?
- Are relationships intact (parent-child, references, links)?
- Does spot-checking real records reveal issues?
- Can users actually do their work in the new system end-to-end?

Success criteria: Three days of real user activity with no data-loss incidents. Reconciliation report signed off. Old system archived (not deleted) for 90 days.

Migration readiness scorecard

Score yourself 0–2 on each item. Total ≥ 16 = ready. 12–15 = fix the gaps before going. < 12 = not ready.

Readiness item	Score (0–2)
Complete data inventory with classification	
Field-by-field mapping document	
Rollback procedure tested	
Stakeholder sign-off on cutover plan	
Dry-run migration completed	
Reconciliation queries written and tested	
Communication plan during cutover	
90-day archive plan for old system	

Decision-maker available during cutover window	___
Users trained on the new system	___
Total	___ / 20

COMMON MISTAKES

Skipping the audit. "We know our data" — until you find 47,000 records of garbage that nobody knew existed.

No rollback plan. "We won't need it" — until you do, at 2 AM.

Cutover without parallel run. Hope is not a strategy.

No validation step. "The migration script said success" is not validation. Check actual data.

MIGRATING SOON?

I help Seattle SMBs migrate between business systems without losing history. If you're staring down a migration and want a sanity check on your plan, book a free 30-minute review.

`seattle.dev/schedule-consultation`