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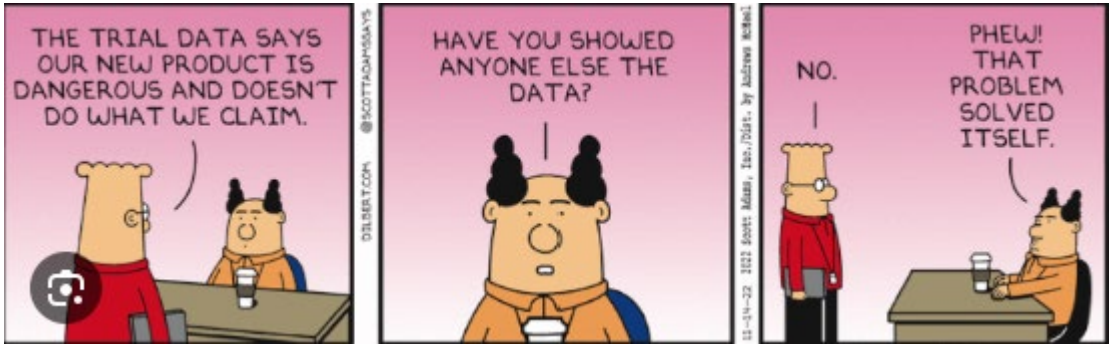
Presentation

Webinar

Data Migrations lesson learnt

When is data real and needed?



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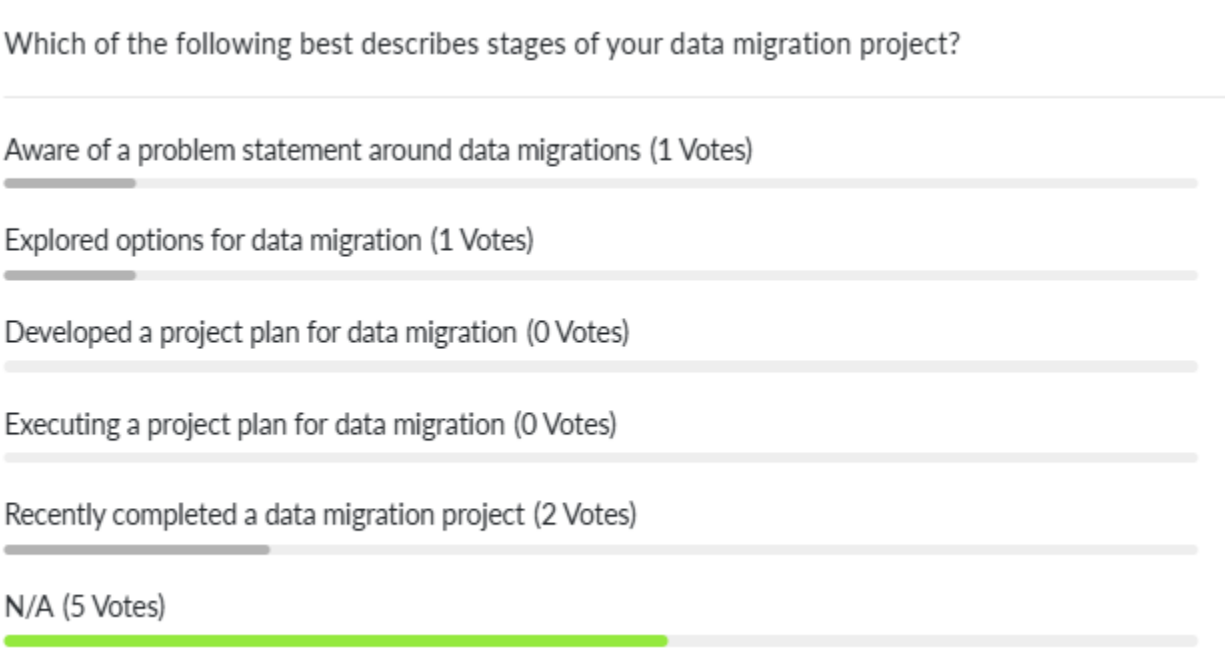
Data migration lessons learnt

What do we mean by data migration ?

- Defining Data migration *is seen generally as the process of transferring data from one system, storage, or format to another. It includes extracting, transforming, and loading data while ensuring accuracy, completeness, and compatibility with the target environment*

- W hat it is not in this context - File transfers

Poll


Which of the following best describes stages of your data migration project?
Aware of a problem statement around data migrations (1 Votes)
Explored options for data migration (1 Votes)
Developed a project plan for data migration (0 Votes)
Executing a project plan for data migration (0 Votes)
Recently completed a data migration project (2 Votes)
N/A (5 Votes)

3 Key lessons over the years

- ‘As is’ migrations
- How much data is migrated
- Reporting impacts

Core Lesson

Getting the scope right is paramount to success.

And being clear about what is NOT in scope.

‘As is’ migrations

- Be clear about what ‘as is’ actually means for stakeholders.
- How much transformation is in scope.
- Pros and cons related to record reconciliation.

How much data is migrated.

- Be clear about the date period that is going to be migrated.
- Transactional data vs rolled up data - ERP
- Access logs etc. Audit trails what happens with this ?

Reporting impacts

- Not just the system reports but also the additional clandestine reports.
- People have their own way of getting data regardless of what we do to curb it.
- Don't take all reports. Carry out an audit of reports.
- Undocumented workflows.

Poll

Which type of data migration project do you have planned in the next 12 months?

Legacy ERP data migration (0 Votes)

HRM data to migration (2 Votes)

Data Warehouse/Lake/puddle migration (1 Votes)

CRM data migration (2 Votes)

GRC/QA database migration (1 Votes)

CX Data migration (0 Votes)

LMS data migration (0 Votes)

Payroll data migration (2 Votes)

None (4 Votes)

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Data Migration - Core systems

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Legacy applications can present greater challenges. Here is what many consider when preparing for their data migration.

- Extensive review of regulatory standards and maintaining compliance.
- Detailed considerations for archiving
- Data warehousing strategies
- API management. Often overlooked if applications are siloed.
- Enterprise resource planning migration.
- Permissions and access control.
- SaaS migration considerations.
- Data cleansing policies. When do they apply? When should they apply?.
- Comprehensive rollback lessons and strategies.

Data Migration - Technical testing phases

More testing is better than less so here are the essentials

1. Planning and Test Strategy Development. Establishes the foundation for testing activities by defining objectives, criteria, and resources needed.

2. Source Data Assessment Testing. Evaluates the quality and completeness of existing data before migration begins. Identifies data issues that need remediation prior to transfer.

3. Data Mapping Validation. Confirms the blueprint for how data will move between systems is accurate. Ensures source fields are correctly mapped to target fields with appropriate transformations.

4. Extract, Transform, Load (ETL) Testing. Verifies that data extraction, transformation rules, and loading processes function correctly. Ensures the technical mechanisms for moving data work as designed.

5. Data Validation Testing Confirms data integrity by comparing source and target data. Ensures completeness, accuracy, and consistency of migrated information through comprehensive reconciliation.

6. Integration Testing Verifies that migrated data works properly with connected systems. Tests how the data functions within the broader ecosystem of applications and interfaces.

Data Migration - The user journey

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Bringing users on the journey

7. User Acceptance Testing (UAT) Business users to validate that migrated data meets required business processes and outcomes.

8. Performance and Volume Testing. Assesses migrated data volumes and performance across all systems efficiently under normal and peak conditions.

9. Regression Testing. Verifies that existing functionality continues to work properly with the migrated data. No broken features.

10. Cutover and Go-Live Testing Rehearse migration timing, procedures, and rollback capabilities before the real migration occurs.

11. Post-Implementation Verification. Validates data integrity in production.

Data migration - Managing Risk

Who is the guardian of your data migration risks.

- A Data Migration manager or Project manager must govern risk.
- Identify potential risks across technical, operational, compliance, and business domains
- Provides risk assessment framework for the project
- Maintains a risk register. Likelihood and impact.
- Provides mitigation strategies for each identified risk
- Monitoring systems to detect early warning signs of risk manifestation
- Regular risk review sessions throughout the migration lifecycle
- Ensures regulatory compliance is maintained throughout the migration
- Reports risk status to executive sponsors and steering committees

Stakeholders affirmation.

What to do if something goes wrong?

- Most risk are identified during each testing stage. UAT being the most engaging.
- Escalate issues early for stakeholders to consider and define the response.
- Do not exclude end users or stakeholders from requirements gathering and testing. They are your best friend and supporter to ensure the program has worked satisfactorily.
- Consider the impact on business continuity from poor data quality and lack of compatibility between systems.
- Provide a framework and solution to enable rollback after testing or production failures.

Any questions/comments ?

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We help our clients mitigate risk and validate their strategic decisions by providing independent and pragmatic advice while taking the time to understand their specific business issues.

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