



Your Complete SumTotal Migration Checklist

Deciding Your Path Before the Platform Decides for You

Cornerstone's acquisition of SumTotal has put every SumTotal customer on a path they didn't choose. Investment in the platform is winding down, and the default route leads to Cornerstone. Whether you follow it, move elsewhere, or stay put for now, that should be a decision, not a drift. Use this checklist to stay organized, avoid common pitfalls, and keep the choice in your hands.

6 phases · 40+ action items | Plan for 12-18 months | Support timeline: December 31, 2027

Migration Readiness Scorecard

Before you dive in, take 60 seconds to assess where you stand. Check every statement that applies to your organization today.

- ☐ We have documented all SumTotal integrations
- ☐ We have identified project stakeholders
- ☐ We have documented compliance requirements
- ☐ We have a preliminary migration timeline
- ☐ We have identified potential LMS vendors
- ☐ We know which learning records must be migrated
- ☐ We have executive sponsorship confirmed
- ☐ We have defined future LMS requirements
- ☐ We understand our full content inventory
- ☐ We know whether our deployment is cloud or on-premise and what that means for data extraction



Don't wait. Most enterprise LMS migrations take 12-18 months end-to-end. Vendor support doesn't fail all at once; it thins out. Fewer updates, slower fixes, departing expertise. The longer you wait, the more of the work falls entirely on you. Start your audit now.

PHASE 1 —

Internal Audit & Alignment

Months 1–2

□ Establish your migration team

Identify project sponsors, LMS administrators, IT stakeholders, HR representatives, compliance leaders, and business unit owners. Every group needs a named owner before work begins.



□ Inventory your current SumTotal environment

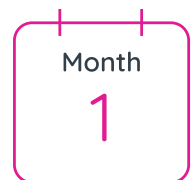
Document all active features, workflows, customizations, certifications, learning programs, reports, and integrations currently in use. You can't migrate what you haven't mapped.



Risk Alert: SumTotal deployments are often heavily customized, and the people who built those customizations may have left years ago. Surface undocumented workflows now, not during testing.

□ Map all integrations

List every system connected to your SumTotal instance: HRIS (Workday, SAP, etc.), SSO providers, content libraries, virtual classroom tools, reporting systems, and any custom APIs.



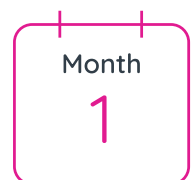
□ Audit your data quality

Review completion records, certification histories, compliance data, and user records for accuracy and completeness. Dirty data migrated is dirty data in your new system.



□ Assess your content inventory

Identify all learning content in SumTotal: SCORM courses, videos, documents, curricula, certifications, and learning paths. Decide up front what to migrate, retire, or rebuild.



□ Review compliance and record-retention requirements

Identify every regulatory, audit, certification, and record-retention requirement that must be preserved through the migration. If you operate in a validated or regulated environment (pharma, finance, energy), your record-integrity requirements need special handling from the very start, and your auditors should know the migration is coming.



□ **Define migration goals and success metrics**

Align leadership on what "done" looks like. Set KPIs up front: learner adoption rate, data migration accuracy, system uptime, and integration completion. Shared goals prevent scope creep.



□ **Secure executive sponsorship**

Get formal sign-off and budget approval from leadership in writing. Migrations without an executive champion routinely lose prioritization when competing projects arise.



PHASE 2 — Define Future Requirements

Months 2–4

□ **Gather stakeholder requirements**

Interview business units and key stakeholders to understand current pain points and future needs. Don't assume the new system should replicate everything the old one did.



□ **Identify must-have capabilities**

Prioritize requirements: compliance management, extended enterprise learning, skills management, reporting, certifications, and mobile learning. Separate must-haves from nice-to-haves before vendor conversations start.



□ **Document reporting requirements**

List every operational, executive, compliance, and learner report that must be recreated in the new system. Reporting gaps discovered after go-live are expensive and disruptive to fix.



□ **Identify future-state opportunities**

Determine which processes can be improved rather than simply replicated. A migration is your best chance to modernize workflows, not just move them.



□ Build your vendor evaluation criteria

Establish weighted criteria for evaluating LMS providers before demos begin. Include migration experience, compliance capabilities, integration flexibility, and a long-term support model.



Risk Alert: The path of least resistance is accepting the default migration to the parent company's platform without evaluating it against your actual requirements. Convenience is not a requirement. Hold every option, including the default, to the same standard.

PHASE 3 — Vendor Evaluation & Selection

Months 4–6

□ Issue RFP or conduct structured demos

Send a formal RFP to shortlisted vendors or run structured demos against your real use cases, not their standard pitch. Ask each vendor to show your actual workflows, not generic features.



□ Ask vendors the hard migration questions

Key questions to ask every vendor: What SumTotal data can be migrated? What typically requires manual work? How many enterprise LMS migrations have you completed? Have you extracted from on-premise deployments?



□ Evaluate the migration experience specifically

Confirm the vendor has migrated customers from SumTotal or similarly complex enterprise environments, not just simpler platforms. The complexity gap matters enormously.



□ Check SumTotal migration references

Ask for customers who completed a migration from SumTotal at a similar scale, ideally in your industry if you're in a regulated sector. Ask them what went wrong, not just what went well. One candid reference call is worth ten polished case studies.



□ Select a vendor and negotiate a contract

Finalize selection with executive approval. Build migration milestones, go-live date commitments, data validation checkpoints, and remediation responsibilities directly into the contract.



PHASE 4 — Planning, Data Prep & Config

Months 6–10

□ Build your detailed migration project plan

Create a project plan with owners, dependencies, and deadlines for every workstream: data, content, integrations, configuration, testing, and training. Assign a dedicated project manager.



□ Define data migration scope

Identify exactly which users, transcripts, certifications, learning history, and records will be migrated. Document what will be archived vs. what must be live in the new system from day one.



□ Plan your data extraction path

If you're on-premise, you control the database, but extraction, transformation, and mapping are your responsibility; confirm you still have the expertise in-house or contract for it. If you're on SumTotal's hosted environment, confirm the extraction process, formats, and timelines with the vendor before you need them.



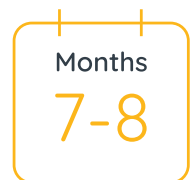
□ Clean and prepare your data

Deduplicate user records, archive obsolete courses, standardize naming conventions, and resolve compliance record gaps before extraction. Data cleanup after migration is significantly harder.



□ Finalize integration architecture

Work with IT to design how each integration will be rebuilt or migrated. Document data flows, field mappings, and sync frequencies. Integrations are where migration timelines quietly double.



□ Configure your new LMS environment

Set up domains, user roles, org structure, branding, learning paths, and catalog architecture. Involve L&D admins early. They'll catch structural issues that IT won't.



Risk Alert: Migrating bad data creates long-term problems in the new LMS that are difficult and expensive to fix after go-live. Invest the time now.

□ **Develop a change management and communication plan**

Draft the full communication strategy for learners, managers, and admins. Define messaging, channels, timing, and ownership for each audience.



□ **Create learner support resources**

Develop FAQs, quick-start guides, short videos, and a support process before go-live. Users who can't find help fast create a wave of support tickets on launch day.



PHASE 5 — Migration, Testing & Launch

Months 10–14

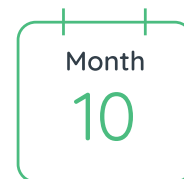
□ **Execute data extraction from SumTotal**

Extract your full data set while platform expertise and support are still available. Request all historical records, not just active ones. You'll need them for audits and compliance.



□ **Run a pilot data migration**

Migrate a representative sample first. Validate completeness, field mapping accuracy, and record integrity before committing to a full migration run. Never skip the pilot.



□ **Migrate and validate content**

Move SCORM/xAPI packages, videos, documents, and assessments. Test each course for completion tracking, grading, and rendering. Spot-check compliance content with extra rigor.



□ **Build and test all integrations**

Rebuild each integration and test end-to-end: user provisioning, SSO, HRIS sync, and content library connections. Run integrations in parallel for at least 2–4 weeks before cutover.



Risk Alert: Certification records frequently require additional validation beyond standard data checks, and in regulated industries a certification gap is a legal exposure, not an inconvenience. Build extra time into this step.

❑ **Validate compliance and certification records**

Run a full audit of migrated compliance completions against your SumTotal source records. Resolve every gap before go-live.



❑ **Conduct user acceptance testing**

Recruit a pilot group of real learners and admins to test under real conditions. Don't rely solely on your internal project team. Real users will break things you'd never anticipate.



❑ **Train administrators and managers**

Run hands-on training sessions using your actual configuration, real content, and specific workflows. Don't send admins to a generic vendor webinar and call it done. Train the trainers before training users.



❑ **Build and rehearse your rollback plan**

Define criteria that would trigger a rollback and confirm SumTotal can remain accessible during a defined post-launch window. You may never use it, but you need it documented and ready.



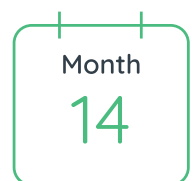
❑ **Send advance communications to all learners**

Notify learners at least 4 weeks before go-live. Explain what's changing, what's staying the same, and where to get help. Early communication cuts support volume dramatically at launch.



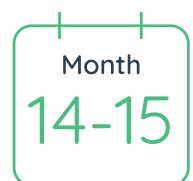
❑ **Execute final data migration and go live**

Freeze updates in SumTotal 24–48 hours before cutover. Run your production migration. Roll out by department or region rather than all users at once. Staged rollouts let you catch issues early.



❑ **Provide hypercare support at launch**

Staff a dedicated support channel for the first 4–6 weeks post-launch. Response times should be hours, not days. Keep SumTotal in read-only mode for 30–60 days so users can reference historical records.



PHASE 6 — Stabilization & Optimization

Months 15–18

□ Measure against your success metrics

Revisit the KPIs defined in Phase 1. Track learner adoption, completion rates, and admin satisfaction. Use data, not gut feel, to prioritize post-launch improvements.



□ Collect learner and admin feedback

Run structured surveys 30 and 90 days post-launch. Focus on usability friction, missing features, and unmet expectations. Make one visible fix from the feedback quickly to begin to build trust.



□ Refine reports and dashboards

Adjust reporting based on real stakeholder use. Reports built before go-live almost always need refinement once people are actually using the system day-to-day.



□ Decommission SumTotal permanently

Once data completeness is confirmed, formally retire SumTotal. Archive final exports in a secure location for audit purposes. Notify the vendor of termination per your contract terms.



□ Conduct a migration retrospective

Debrief your full project team: what worked, what didn't, what you'd do differently. Document lessons learned, which is invaluable for any future rollouts or platform changes.



□ Build your continuous improvement roadmap

Define ownership, governance, and cadence of your updates going forward. Identify future enhancements and establish a regular review cycle for content, integrations, and platform capabilities.



Ready to choose your path forward?

ExpertusONE has helped many complex organizations migrate from legacy enterprise LMS platforms. Talk to a migration specialist. No pitch, just a practical conversation about your situation.

[Talk to a migration specialist](#)



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