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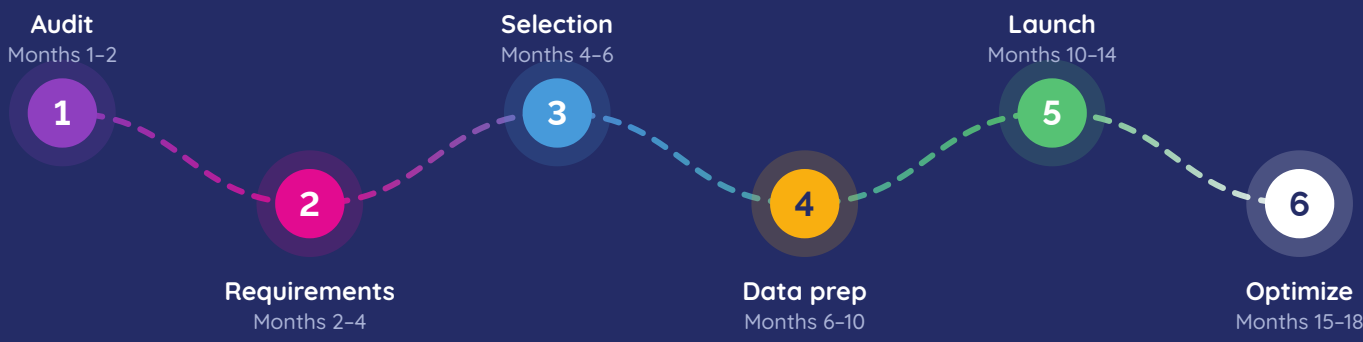

Your Complete LMS Migration Checklist

Deciding Your Path Before the Platform Decides for You

Contract renewals, vendor acquisitions, end-of-support notices, or simply outgrowing your platform: every LMS change arrives with a clock attached. Whether you move to a new system, renew with your current vendor, 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

12–18
months to plan for

Start well before your renewal window.

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 current LMS 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 current LMS 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, and renewal dates, notice periods, and vendor support timelines don’t move to accommodate you. The longer you wait, the fewer options you have and 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.

Month 1

☐ **Inventory your current LMS 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.

Month 1

Risk Alert: Long-running LMS 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 current LMS: HRIS (Workday, SAP, etc.), SSO providers, content libraries, virtual classroom tools, reporting systems, and any custom APIs.

Month 1

☐ **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.

Month 1

☐ **Assess your content inventory**

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

Month 1

☐ **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.

Month 2

☐ **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.

Month 2

☐ **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.

Month 2

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.

Month 2

☐ **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.

Month 2

☐ **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.

Month 3

☐ **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.

Month 3

☐ **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.

Month 4

Risk Alert: The path of least resistance is renewing with your current vendor, or accepting whatever upgrade path they offer, without evaluating it against your actual requirements. Convenience is not a requirement. Hold every option, including the incumbent, 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.

Month 4

☐ **Ask vendors the hard migration questions**

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

Month 4

☐ **Evaluate the migration experience specifically**

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

Month 5

☐ **Check migration references**

Ask for customers who completed a comparable migration 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.

Month 5

☐ **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.

Month 5

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.

  Month 6

- [ ] **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.

  Month 6

- [ ] **Plan your data extraction path**

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

  Month 6

- [ ] **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.

  Months 6-7

- [ ] **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.

  Months 7-8

- [ ] **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.

  Months 8-9

> **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.

Month 9

☐ **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.

Month 10

PHASE 5 — Migration, Testing & Launch

Months 10–14

☐ **Execute data extraction from your current LMS**

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.

Month 10

☐ **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.

Month 10

☐ **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.

Month 11

☐ **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.

Months 11-12

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 source system records. Resolve every gap before go-live.

  Month 12

- [ ] **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.

  Month 12

- [ ] **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.

  Month 13

- [ ] **Build and rehearse your rollback plan**

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

  Month 13

- [ ] **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.

  Month 13

- [ ] **Execute final data migration and go live**

  Freeze updates in your current LMS 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.

  Month 14

- [ ] **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 your previous LMS in read-only mode for 30–60 days so users can reference historical records.

  Months 14-15

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.

  Month 15

- [ ] **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.

  Months 15-16

- [ ] **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.

  Month 16

- [ ] **Decommission your legacy LMS**

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

  Month 16

- [ ] **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.

  Month 17

- [ ] **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.

  Month 18

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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