Help desk migration checklist

While the exact steps you need to complete a successful help desk migration will depend on the systems you're moving from and to, your support setup, goals, and compliance and security requirements, you can use the checklist below as a starting point. We've also left space for you to add checklist items that are unique to your business.

01 To do pre-migration

- [ ] Audit your current tickets, fields, workflows, and automations to decide what's still worth keeping.
- [ ] Archive outdated records you won't need in your new help desk.
- [ ] Confirm the new platform meets your compliance requirements, such as HIPAA or GDPR.
- [ ] Choose your migration approach: DIY, an automated migration tool, or a migration run by your vendor.
- [ ] Map each custom field in your current help desk to its equivalent in the new one.
- [ ] Document your automations, triggers, SLA policies, reports, and integrations, since these will need to be rebuilt in the new system.
- [ ] Give agents early access to the new help desk and train them before go-live.
- [ ] Schedule the migration outside business hours, or plan to transfer records created during the migration once it's finished.
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02 To do during the migration

- [ ] Run a test migration with a sample of your records.
- [ ] Adjust field mappings and rerun the test until the results are right.
- [ ] Run the full migration when scheduled. Keep your team working in the original help desk so customers don’t see a break in service.
- [ ] Confirm any new or updated records from the migration window transfer to the new help desk.
- [ ] Rebuild your automations, triggers, and SLA policies in the new platform.
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03 To do post-migration

- [ ] Check the migrated data, including ticket history, contact records, attachments, and agent attribution.
- [ ] Reinstall and reauthorize integrations with your support channels, CRM, and other tools.
- [ ] Move your team over to the new help desk and go live.
- [ ] Rebuild reports and dashboards using migrated historical data.
- [ ] Ask agents for feedback and offer more training when needed.
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