

Data migration – how to succeed?

Data migration has with the years and growing data bases become the single most complex challenge to do with good quality in an ERP project. And since data is the blood flowing through the stream of the patient in the heart transplant that an ERP go-live represents you need to pay attention.

Plan for many migration iterations

Many things in an ERP project are planned in a waterfall fashion just for the sheer complexity of all process in a company being affected by the change. However, the data migration dictates the entire schedule in a roll-out project

First things first

It is impossible to exaggerate the need to get the data migration right. If you mess up, you really mess up! If you have heard of ERP go-lives where the company was unable to invoice customers post go-live, it usually had nothing to do with technology, it had all to do with data migration. So, make data migration your first priority. Build your full implementation timeplan around how many data migrations you need. Usually 4-6 test migration cycles are needed. The best quality we have seen has come after 11-12 test migrations. And we have never failed in making employees get invoices out the door in the first invoicing cycle.

Please note our full focus on invoicing, it is the oxygen for a company, without it the patient dies!

Build knowledge with key stakeholders

Learning how your data changes as you move from one system to another is THE factor in ensuring invoicing capacity post go-live. Even though you may believe that you will technically get the formal data migration right in lesser number of migrations, the learning process for migrators, validators and other participants are even more important. We would any day of the week take a poor data quality migration with skilled users than top-notch data quality with novice users.

When you have the above understanding you also understand which people you need to include as data validators and data owners.

Manage data scope expectations

Many employees of the company will have the expectation that they will get all history and all tweaks on their personal data transferred. This is of course not going to happen so you need to clarify and manage expectations. In order to clarify and anchor the scope you will need a migration strategy which is signed-off by the ultimate data owner in the company, usually the CFO. This strategy will then guide the entire migration process and activities. Change requests from validators will need to be approved by the CFO as scope changes.

It is advisable to cut down on historical transactions as much as possible and instead provide viewing rights into the old systems. With the same logic you may also, if technically possible, allow AR and AP to run out in the old system and only start fresh in the new system. Try to find as many opportunities as possible to cut down on the scope. The CFO will of course be interested in providing previous year's comparable numbers to BU leaders but do not fall into this trap if you can avoid it.

When moving into a new house, do not bring old garbage

Employees either get lazy, the company does not have a very disciplined approach to data governance and/or they have been allowed to develop their own ways of working in different parts of the business. In any case, this always shows up as complications in the data migration process. You have to initiate spring cleaning! This is harder than it sounds so you should plan this in and start on it from the beginning of the

project. This also needs to be stated in the migrations strategy together with register ownerships and accountabilities.

Get the A-team

Understanding how to transform data generated in one data model in the old system into the new data model in the new system without messing up customer & invoicing data, pricelists, inventory counts, project balances, reports and KPIs too much is true wizardry. The one you assign as responsible for the data migration subproject needs to be highly intelligent, understand database languages, understand economic concepts and be able to plan and drive the process. I think you get it, you do not find this person easily. And yes, they are expensive. But your trade-off is; pay this person big dollars or risk not being able to invoice. Or get the accounting completely screwed up.

You need to think like this with all people assigned to the data migration.

Do not forget the friends

Connected systems, aka “Friends”, will have data affected by the replacement of ERP. These will also need to get data converted, e.g. project numbers, article numbers etc. Have the team analyze and develop a plan for the approach and if possible, do also this type of conversion in test to verify that all systems will be fine after the future go-live.

Perform a risk analysis and mitigation plan

We advise that you develop a migration management plan in which all aspects of the go-live migration are covered incl. back-up resources, roll-back scenarios and plans, escalations routes and check-points. It prepares the team and management for the cases where things do not turn out in the best-case scenario.

Make a hard stop

When validators and the CFO has signed off on the data quality of the last (or even before) migration you need to enforce a hard stop on changing scripts and logic. This may be harder than it sounds because at this point the migration team has gotten used to tweak and optimize a little here and there. You have to get them to agree to stop in order to ensure the same quality in the final go-live migration.

Structure the validations with the auditor in mind

Most companies have external auditors that require to see the results of the data migration before they are prepared to issue their audit statement. Make sure to get their requirements on the validation material so you can readily hand this over after the go-live.

Create clear interfaces

The whole process works best if there are clear hand-over points between migrators and validators. A straightforward way to do this is to schedule formal hand-over meetings both ways to hand-over and inform. The migration responsible needs to get a report back about findings that needs to be corrected to the next iteration.

Finally

If you follow our advice here and apply normal project management approaches you will be doing the best you can in this area.