INTELLUM

PRINTABLE CHECKLIST

LMS Migration Checklist

An LMS migration checklist covers six phases: preparing before you migrate, setting key dates, migrating and validating data, running a pilot, communicating the change, and supporting the platform after launch. Use this checklist to prepare for the transition early, so you can make smart choices, avoid surprises, and hit the ground running.

Your timeline

Start about 12 months before your contract ends.

Current contract end date _____

BEFORE END	MILESTONE	YOUR DATE
12 months	Start the search and align stakeholders	
10 months	Requirements set, vendor chosen (Chainalysis took about 2 months)	
8 months	Contract signed, kickoff with the new vendor's implementation team	
2 months	Pilot with a small user group	
1 week	Cutoff for in-progress enrollments; final data pull	
1 week	Cutover: about a day of downtime while the platforms switch	
1 week	Go-live, with buffer before the old contract ends	

Who's involved

Loop in the right partners early.

IT & Systems
What are our technical and configuration hurdles?
Owner _____

Compliance & Legal
Are we abiding by our privacy policy? Do our terms and conditions need to change?
Owner _____

Operations
How do we get this LMS rolled out internally and supported post-launch?
Owner _____

Customer Success
How do we onboard this LMS with learners?
Owner _____

Customer Support
What questions or pain points do we anticipate?
Owner _____

01 Before you migrate

- [ ] **Conduct a pre-migration planning session.** Form a migration team with stakeholders from Education, IT, Support, and Ops. Clarify roles, goals, and assumptions to avoid blind spots later.
- [ ] **Document user groups and enrollment rules.** Map how users are segmented today and how they access content. Include permissions, enrollment triggers, and group-level assignments.
- [ ] **Catalog all system communications.** List automated messages and notifications your current LMS sends (e.g., reminders, expirations, completion emails). Identify gaps or frustrations to improve in your next system.
- [ ] **Define success metrics.** Common goals for a successful migration include improved learner experience, increased content adoption, streamlined administration, and reduced support inquiries. If your program supports a business goal, add the metric the business already tracks for it, such as product adoption, renewal rate, or time to proficiency, and record its value before the switch so you can compare after. These goals will shape both your platform choice and your migration roadmap.
- [ ] **Back up all data before the migration.** Ensure you have a complete backup to prevent data loss.
- [ ] **Anticipate any branding changes.** Communicate brand needs as quickly as possible, as they can significantly delay the migration process.

02 Set key dates

- [ ] **Set a cutoff for completing "in-progress" enrollments.** Determine a date by which learners should complete ongoing courses to prevent data loss during migration. DATE

- [ ] **Schedule the migration window.** Plan for a period with minimal user activity to reduce impact. Expect about a day of downtime at cutover; anything that changes after the final data pull, such as a learner finishing a course, has to be pulled and updated again. DATE

- [ ] **Plan internal testing and pilot review dates.** Allocate time for thorough testing before full deployment. DATE

- [ ] **Establish the anticipated go-live date.** Communicate this clearly to all stakeholders to align expectations. DATE

03 Migrate and validate the data

- [ ] **Validate data post-migration.** Conduct checks to confirm all data has been accurately transferred and is functioning as expected.

04 Run a pilot

- [ ] **Select a pilot user group.** Choose internal teams or trusted customers to test the new LMS.

- [ ] **Test course delivery, enrollments, and user experience.** Use surveys or interviews to gather feedback on usability, functionality, and flow.

- [ ] **Make adjustments before a full rollout.** Implement changes based on pilot feedback to enhance the user experience.

05 Communicate the change

When sharing your rollout plans, focus on what's changing, why, and when. Reassure your customers that you'll communicate more information or instructions when it's needed. Be sure to share up-to-date timelines with your customers, and prepare existing users if you expect any downtime in access to the learning environment.

- [ ] **Notify learners about the new platform and why you're switching.** Provide clear reasons and benefits to encourage buy-in.
- [ ] **Share expected timelines, known downtimes, and FAQs.** Keep users informed to manage expectations.
- [ ] **Provide links to support materials and onboarding instructions.** Offer resources to help users navigate the new system.
- [ ] **Establish a feedback channel.** Allow users to report issues and suggest improvements during the transition.

06 After launch

- [ ] **Train administrators and support staff.** Cover the tasks each role will handle in the new platform, such as enrolling users, running reports, and answering learner questions, before go-live.
- [ ] **Monitor system performance post-migration.** Keep an eye on system stability and user engagement metrics.
- [ ] **Plan for ongoing support and improvement.** Establish a process for continuous improvement based on user feedback and performance data.

Plan Your LMS Migration With Intellum

If you're planning a switch, book a demo to walk through how Intellum's services team would handle your migration. If you're still building your shortlist, use our LMS RFP template to put the same questions to every vendor.

Book a demo