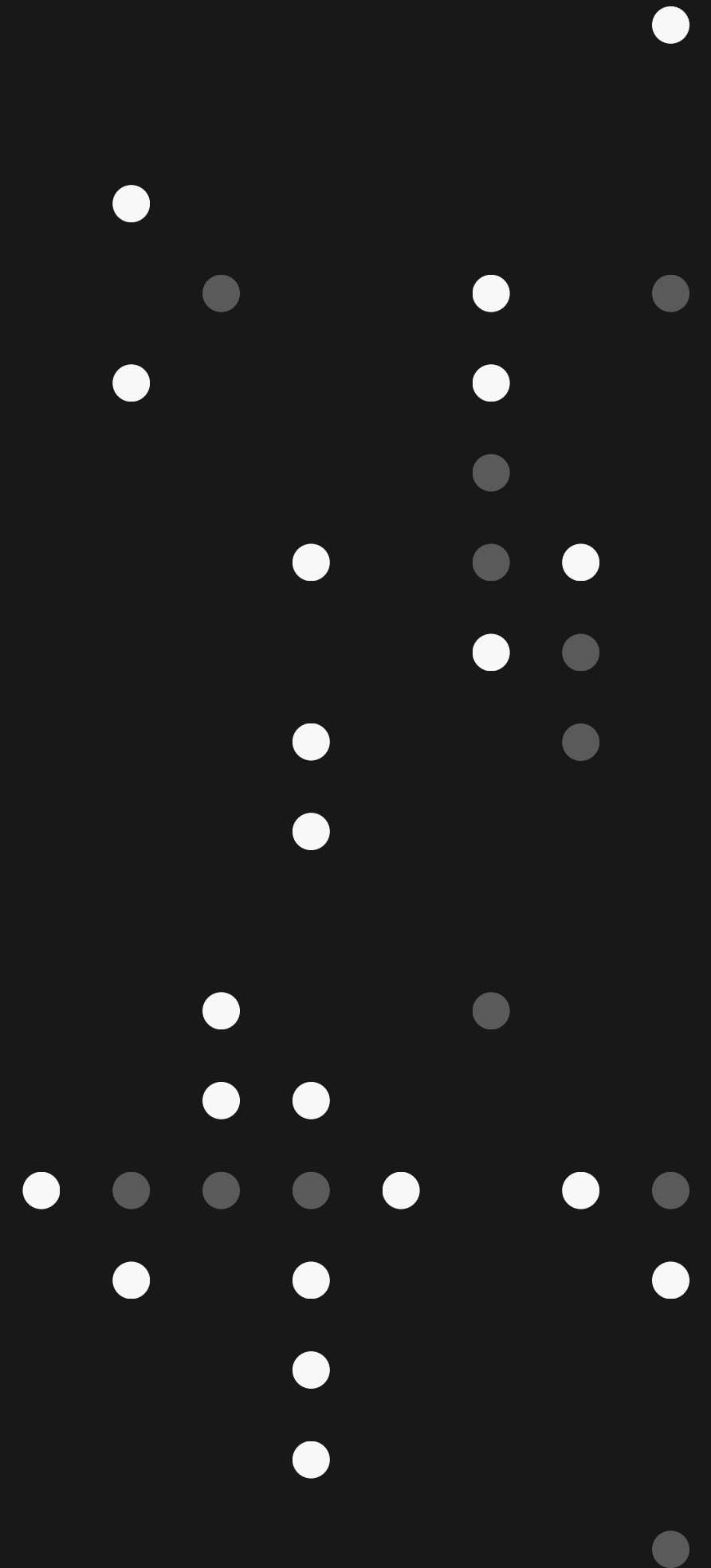


INTELLUM

LMS MIGRATION CHECKLIST

# Your Strategic Guide to a Seamless Transition

Ready to switch LMS platforms? Use this checklist to manage a smooth, efficient migration and ensure your next LMS supports scalable, measurable growth.



# Why Switching Your LMS Is Worth the Stress

Let's be honest: migrating to a new LMS is a big deal.

It's time-consuming. It's stressful. It can feel overwhelming. And when your team is already stretched thin, the easier path often feels like doing nothing at all—sticking with a system that kind of works, even if it's clunky, outdated, or holding your program back. But here's the hard truth: staying put also has a cost.

Every day you spend in a system that can't scale, doesn't support your goals, or frustrates your learners is a day you're losing momentum. You're leaving value on the table. You're delaying the growth, retention, and operational efficiency that a modern LMS could help you unlock.

We created this checklist to make migration feel less intimidating and a lot more doable. Whether you're in the early planning stages or actively preparing for the switch, this resource will help you organize your approach, ask the right questions, and avoid common pitfalls. Most of all, we want you to feel confident. Because when you make the move with intention and support, you're not just migrating systems—you're building the foundation for Education-Led Growth.

**Let's get you there.**

# Pre-Migration Evaluation Checklist

**LMS migration doesn't begin when the contract is signed—it starts the moment you begin your search.** The questions you ask during the evaluation process are critical. They not only shape your vendor decision, but also determine how smoothly your migration will go.

This checklist will help you prepare for that transition early, so you can make smart choices, avoid surprises, and hit the ground running.

## Pre-Migration Essentials



01

### What data do you need to migrate?

- Identify core categories like learning content, user profiles, and enrollment data.
- Consider versioning, status (active/inactive), and whether completion or certification records need to be preserved.



02

### What will be built new vs. migrated?

- Determine which elements (courses, certifications, learning paths) should be rebuilt from scratch, especially if they're outdated, duplicative, or not aligned with your current strategy.



03

### What LMS functionality is mission-critical?

- Define your must-haves: e.g., custom branding, user segmentation, automated notifications, integrations, or multilingual support.
- Make sure your shortlist of platforms can deliver.

#### RESOURCE

**Need help figuring out what to put on your RFP?**

[Download this free checklist](#) →



04

### Conduct a pre-migration planning session

- Align stakeholders from Education, IT, Support, and Ops.
- Clarify roles, goals, and assumptions to avoid blind spots later.



05

### Audit and inventory your content

- Build a list of all training assets—eLearning, videos, PDFs, quizzes—and assess relevance, engagement, and compliance.
- Tag content for migration, revision, or retirement.
- Tag and categorize content by initiative or audience.
- Review and standardize branding assets (logos, course templates).



06

**Build a course and curricula catalog**

- Document course objectives, intended audiences, prerequisites, and format types (e.g., SCORM, xAPI, videos, instructor-led).



07

**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.



08

**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.



09

**Evaluate content compatibility**

- Confirm which file formats (SCORM 1.2, xAPI, MP4, etc.) will work in the new LMS.
- Flag anything that will need conversion or rework.
- Rebuild or rebrand course layouts as needed: Take this opportunity to update and improve course designs.



10

## Define success metrics

- What does a successful migration look like?  
Common goals include:
  - Improved learner experience
  - Increased content adoption
  - Streamlined administration
  - Reduced support inquiries
- These goals will shape both your platform choice and your migration roadmap.

### PRO TIP

**High-success orgs use vendors as strategic partners—not just for speed, but for guidance, skills, and transformation.**

Forrester, 2024

## Questions to Ask Your LMS Vendor:



Do you migrate the full course with metadata, or only the content asset?



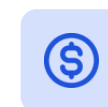
Can we migrate custom fields and detailed user properties?



Are completed enrollments migrated with status, date, and expiration?



What hands-on migration assistance is included?



Are there additional costs for support?

# Migration Execution

**Migrating to a new LMS is more than just transferring data—it’s an opportunity to enhance your learning ecosystem.**  
A strategic approach ensures minimal disruption and sets the stage for improved learning outcomes.



## Define Key Dates and Deadlines

- **Set a cutoff for completing “in-progress” enrollments**  
Determine a date by which learners should complete ongoing courses to prevent data loss during migration.
- **Schedule the migration window**  
Plan for a period with minimal user activity to reduce impact.
- **Plan internal testing and pilot review dates**  
Allocate time for thorough testing before full deployment.
- **Establish the anticipated go-live date**  
Communicate this clearly to all stakeholders to align expectations.



## Migrate Data Strategically

- **Prioritize completed enrollments over in-progress ones**  
Ensure historical data is accurately transferred.
- **Import only active user records**  
Archive inactive users to maintain data integrity.
- **Validate data post-migration**  
Conduct checks to confirm all data has been accurately transferred and is functioning as expected.



## Run a Pilot Launch

- **Select a pilot user group**  
Choose internal teams or trusted customers to test the new LMS.
- **Test course delivery, enrollments, and user experience**  
Gather feedback on usability and functionality.
- **Collect feedback on usability and flow**  
Use surveys or interviews to identify areas for improvement.
- **Make adjustments before a full rollout**  
Implement changes based on pilot feedback to enhance the user experience.



## Communicate the Change

- **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.



## Additional Considerations

- **Backup all data before the migration**  
Ensure you have a complete backup to prevent data loss.
- **Train administrators and support staff**  
Gather feedback on usability and functionality.
- **Monitor system performance post-migration**  
Keep an eye on system stability and user engagement metrics.
- **Plan for ongoing support and optimization**  
Establish a process for continuous improvement based on user feedback and performance data.

# Post-Migration Optimization

## Ready to Migrate with Confidence?

A strategic LMS migration doesn't just move data—it builds the foundation for scalable, impactful education. When approached thoughtfully, migration becomes your chance to rethink how you deliver learning experiences across audiences. Whether you're educating customers, partners, or employees, the right LMS empowers you to engage learners more effectively, drive business outcomes, and support long-term growth.

Explore how Intellum supports high-impact LMS migrations.

**Book a demo →**

