

90-Day eDiscovery Migration Plan

OVERVIEW

A working worksheet for switching platforms without disrupting active matters: audit inventory, phase plan with owners and dates, the week-by-week timeline, and the per-matter cutover runbook.

Companion to Venio's Platform Migration Guide.

Organization: _____

Prepared by: _____

Date: _____

Current-platform renewal date (your deadline): _____

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Phase 1: Audit - Inventory

Inventory	Findings / notes	Owner	Done
Matters by state (active-review / pre-review / dormant / closing <90d / closed-hosted)			
Data volumes & formats per matter; load-file availability			
Work product: coding schemes, tags, redactions, privilege logs, productions			
Active legal holds, custodians, preservation obligations, protective orders			

Inventory	Findings / notes	Owner	Done
Current contract: renewal date, notice period, export terms, hosting minimums			
Pre-sale test: one real workspace exported and ingested by new vendor; survival audited			

Test the plan before you commit

Venio ingests a real workspace from your current platform pre-sale - coding, tags, and redactions included - so step 6 of the audit is answered with your own data.

02

Phase 2: Plan

Phase	Key workstreams	Owner	Start	Exit date
1 · Audit & prep	Inventory above; platform setup: security model, matter templates, integrations; role-based training + champions named			
2 · Parallel run	All new matters on new platform (exceptions need named approver); white-glove first 2–3 matters; weekly adoption metrics			
3 · Cutover & wind-down	Deliberate per-matter cutovers; archive closed-but-hosted matters; legacy wind-down plan against renewal date			

Phase 3: Week-by-Week Timeline

Weeks	Workstream	Exit criteria
1–2	Kickoff; full audit; export terms confirmed	Audit tables complete; renewal deadline set
3–4	Platform setup; real-workspace ingest test; training + champions	Test workspace verified vs. work-product list; teams trained
5–8	Parallel running; white-glove first matters; weekly metrics	2–3 matters end-to-end; zero unapproved exceptions
9–12	First cutovers (dormant + long-running early-stage); archive closed-hosted; wind-down dated	Runbook proven; archive complete; wind-down plan signed

Phase 4: Per-Matter Cutover Runbook

#	Step	Completed by	Date
1	Confirm cutover justified (long-running early-stage / dormant / cost-trapped) - default is no		
2	Freeze matter on old platform; notify matter team		
3	Export: natives, load files (.DAT/.OPT), production sets, coding/tag maps		
4	Ingest on new platform; zero per-GB ingestion confirmed		
5	Verify: document counts, coding, redactions, privilege log vs. audit list		
6	Matter-team sign-off recorded		
7	Retire old workspace; file runbook record with matter documentation		

See a real workspace from your current platform ingested on Venio before you commit.

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