



LMS Migration Checklist

Use this comprehensive checklist to guide your organization through a successful LMS migration. This checklist is specifically designed for HR Systems Owners, IT Managers, and L&D Managers.

Planning Phase



Team Assembly

- ☐ Identify project leader
- ☐ Include representatives from HR, IT, and L&D departments
- ☐ Assign clear roles and responsibilities
- ☐ Establish regular meeting schedule
- ☐ Document communication protocols



Requirements Gathering

- ☐ Document limitations of current system
- ☐ Define must-have features for new system
- ☐ Identify nice-to-have features
- ☐ Document compliance requirements
- ☐ Establish security requirements



Success Metrics

- ☐ Define user adoption targets
- ☐ Set course completion rate goals
- ☐ Establish administrative time-saving metrics
- ☐ Document compliance reporting requirements
- ☐ Create system performance benchmarks



Timeline & Budget

- ☐ Create detailed project timeline
- ☐ Include 20% buffer for unexpected issues
- ☐ Secure budget approval
- ☐ Document resource allocations
- ☐ Establish go/no-go decision points

Data Preparation Phase

1 Data Audit

- ☐ Inventory all user accounts
- ☐ Catalog all courses and content
- ☐ Document completion records and certificates
- ☐ List custom fields and reports
- ☐ Identify historical data requirements

2 Data Cleansing

- ☐ Remove duplicate user accounts
- ☐ Update outdated user information
- ☐ Archive inactive courses
- ☐ Standardize naming conventions
- ☐ Resolve data inconsistencies

3 Data Mapping

- ☐ Create field mapping document
- ☐ Map course structures
- ☐ Document learning path conversions
- ☐ Map user roles and permissions
- ☐ Define data transformation rules

4 Backup Creation

- ☐ Create full system backup
- ☐ Back up all course content
- ☐ Export all user records
- ☐ Save all completion data
- ☐ Document backup location and access methods



Configuration Phase

System Setup

- ☐ Configure system branding
- ☐ Set up organizational structure
- ☐ Create user roles and permissions
- ☐ Set up notification templates
- ☐ Configure language settings

Authentication & Security

- ☐ Set up SSO integration
- ☐ Configure password policies
- ☐ Establish user provisioning methods
- ☐ Set up security roles
- ☐ Test authentication flows

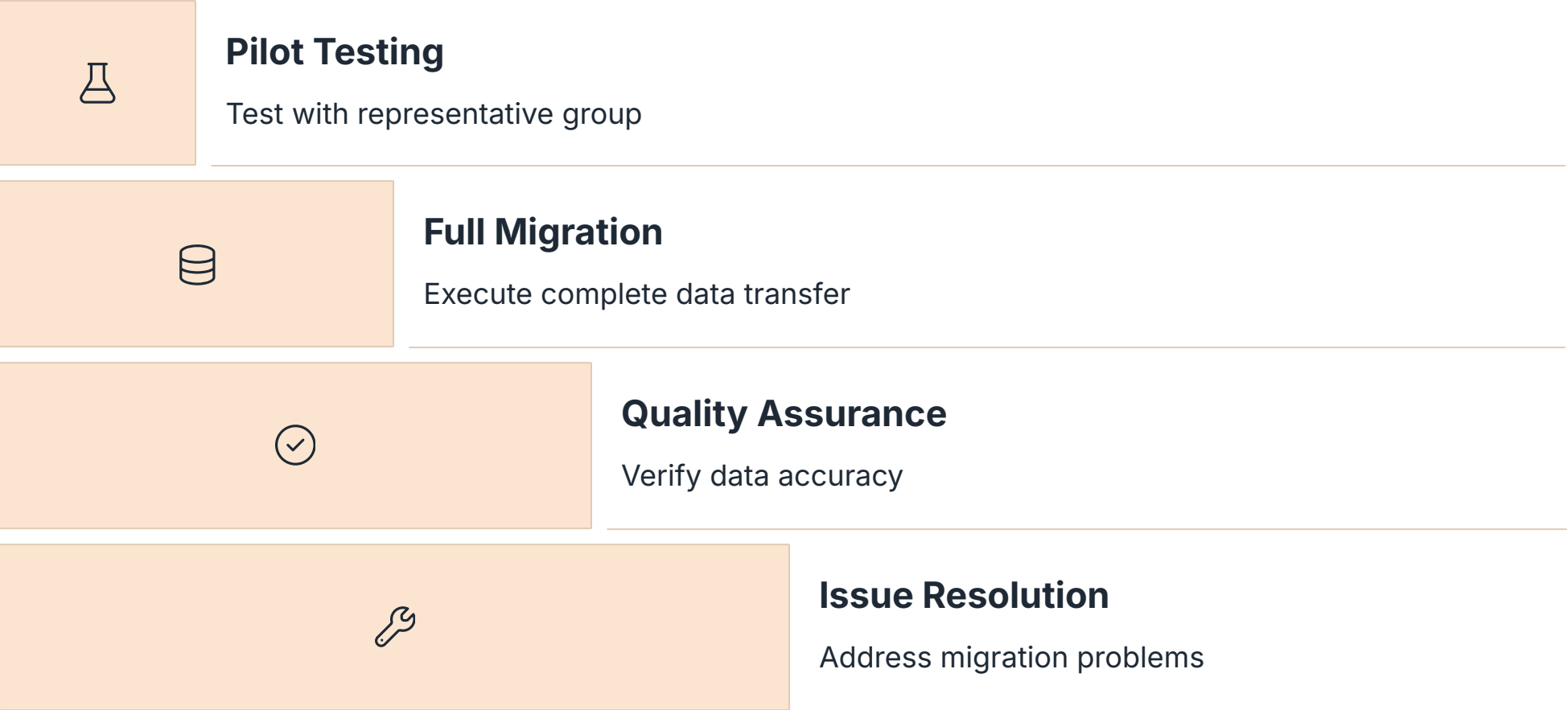
Integrations

- ☐ Configure HRIS integration
- ☐ Set up content system connections
- ☐ Establish reporting tool integrations
- ☐ Configure email systems
- ☐ Test all integration points

Learning Structure

- ☐ Set up course categories
- ☐ Configure learning paths
- ☐ Establish certification processes
- ☐ Set up assessment methods
- ☐ Configure completion rules

Migration Execution



Pilot Testing

- ☐ Select representative test group
- ☐ Migrate sample user accounts
- ☐ Transfer test course content
- ☐ Migrate sample completion records
- ☐ Collect and address feedback

Full Migration

- ☐ Execute user data import
- ☐ Migrate course content
- ☐ Transfer completion records
- ☐ Import system settings
- ☐ Migrate custom reports

Quality Assurance

- ☐ Verify user account accuracy
- ☐ Validate course functionality
- ☐ Test completion tracking
- ☐ Check certificate generation
- ☐ Validate reporting accuracy

Issue Resolution

- ☐ Document all migration issues
- ☐ Prioritize problems by impact
- ☐ Resolve critical issues before launch
- ☐ Create workarounds for minor issues
- ☐ Update documentation with resolutions

Launch Preparation & Go-Live Phase

Launch Preparation

- ☐ Create administrator training
- ☐ Develop manager training materials
- ☐ Prepare end-user tutorials
- ☐ Record system walkthrough videos
- ☐ Develop quick reference guides
- ☐ Draft executive announcement
- ☐ Create manager briefing materials
- ☐ Prepare end-user communications
- ☐ Develop FAQs
- ☐ Schedule announcement timing
- ☐ Establish support procedures
- ☐ Train support personnel
- ☐ Create troubleshooting guides
- ☐ Set up feedback mechanisms
- ☐ Define escalation processes
- ☐ Complete full system test
- ☐ Verify all integrations
- ☐ Test under expected load
- ☐ Confirm backup procedures
- ☐ Conduct final stakeholder review

Go-Live Phase

- ☐ Release to pilot group
- ☐ Collect and address feedback
- ☐ Make necessary adjustments
- ☐ Document lessons learned
- ☐ Prepare for full launch
- ☐ Execute communication plan
- ☐ Provide access to all users
- ☐ Deliver scheduled training
- ☐ Monitor system performance
- ☐ Staff support channels
- ☐ Track login activity
- ☐ Monitor course enrollments
- ☐ Check completion records
- ☐ Review support tickets
- ☐ Document system performance
- ☐ Address login problems
- ☐ Resolve content access issues
- ☐ Fix enrollment discrepancies
- ☐ Correct reporting inaccuracies
- ☐ Document all resolutions

Post-Migration Phase

30-Day Review
Analyze metrics and feedback

Knowledge Transfer
Update documentation and training



Optimization
Implement improvements

Long-term Evaluation
Review against success metrics

30-Day Review

- ☐ Analyze adoption metrics
- ☐ Review support ticket trends
- ☐ Collect user feedback
- ☐ Identify priority improvements
- ☐ Document lessons learned

Optimization

- ☐ Implement UX improvements
- ☐ Enhance reporting capabilities
- ☐ Optimize system performance
- ☐ Refine integration points
- ☐ Update training materials

Long-term Evaluation

- ☐ Review against success metrics
- ☐ Calculate ROI
- ☐ Document benefits realized
- ☐ Identify ongoing challenges
- ☐ Plan future enhancements

Knowledge Transfer

- ☐ Update system documentation
- ☐ Conduct additional training as needed
- ☐ Cross-train team members
- ☐ Document best practices
- ☐ Create sustainability plan

Role-Specific Checklists & Final Verification

For HR Systems Owners

- ☐ Verify employee data accuracy
- ☐ Confirm regulatory training assignments
- ☐ Validate compliance reporting
- ☐ Test certification management
- ☐ Verify records retention policies
- ☐ Test onboarding workflow
- ☐ Validate offboarding processes
- ☐ Confirm org chart synchronization
- ☐ Verify performance review integration
- ☐ Test job role-based assignments
- ☐ Confirm compliance dashboard functionality
- ☐ Validate skills gap reporting
- ☐ Test completion by department reports
- ☐ Verify certification expiration alerts
- ☐ Confirm regulatory audit reports

For IT Managers

- ☐ Test system under peak load
- ☐ Validate response times
- ☐ Confirm storage utilization
- ☐ Review bandwidth requirements
- ☐ Establish performance monitoring
- ☐ Verify data encryption
- ☐ Test authentication security
- ☐ Confirm access controls
- ☐ Validate backup integrity
- ☐ Verify compliance with security policies
- ☐ Document system architecture
- ☐ Create disaster recovery procedures
- ☐ Establish maintenance schedule
- ☐ Define update procedures
- ☐ Configure system monitoring
- ☐ Validate SSO functionality
- ☐ Test API connections
- ☐ Confirm data synchronization
- ☐ Verify file imports/exports
- ☐ Document integration points

For L&D Managers

- ☐ Verify course importing
- ☐ Test content authoring tools
- ☐ Confirm multimedia functionality
- ☐ Validate learning path creation
- ☐ Test content updating procedures
- ☐ Review user interface
- ☐ Test mobile functionality
- ☐ Validate social learning features
- ☐ Confirm gamification elements
- ☐ Test accessibility compliance
- ☐ Verify quiz functionality
- ☐ Test assessment tools
- ☐ Confirm completion tracking
- ☐ Validate skills assessments
- ☐ Test learner progress reporting
- ☐ Configure automated enrollments
- ☐ Test notification systems
- ☐ Verify learning path functionality
- ☐ Confirm instructor management
- ☐ Test virtual classroom integration

Final Success Verification

- ☐ All critical features functioning correctly
- ☐ User adoption meeting targets
- ☐ Support ticket volume at acceptable levels
- ☐ System performance meets requirements
- ☐ Stakeholder satisfaction confirmed
- ☐ ROI metrics on track
- ☐ Training program continuity maintained
- ☐ Migration project officially closed

This checklist is provided by Tovuti LMS to help ensure your migration success. Customize it to your organization's specific needs.

Interested in learning more about Tovuti? [Schedule a demo](#). Looking for more resources including Checklists, Reports, and Guides? [Check out our library here](#).