DATA MIGRATION WORKSHEET FOR SEARCH FIRMS

With over 13 years of Data Migration experience and working with search firms to move their data from an existing legacy search software to Clockwork, below are a few things we advise our customers look for, ask and consider during a Data Migration.

Step In Data Migration Process:	Task Owner:	Timeline or Date:
Schedule Kick-Off call / meeting with new search software provider and key stakeholders to set expectations and milestones.		
Conduct data audit and review which data will be critical to migrate - look for duplicates, incomplete records, bad data, etc.		
Examine candidate statuses, tags, fields, custom fields, notes, project configurations, etc. and identify any redundancies.		
Ask for recommendations from the new search software provider for ways to streamline the search process.		
Re-map all fields and statuses and choose new data end points for all fields being migrated.		
Are there any separate documents or files that can be imported during the migration? Resumes, Finance or Bus. Dev.?		
Identify opportunities or the need to integrate with other external search process tech, tools or platforms.		
Schedule training sessions for team members and firm for new search software.		
Notify and request data backup from legacy search software.		
Request a review of sample data records moved over and mapped for review before all data is migrated and live.		
Enrich and refresh all data migrated or choose specific targets, lists, companies, people, etc.?		
Set a deadline for completely moving the team away from using and accessing old legacy search system.		

CLOCKWORK RECRUITING