



Data migration workbook appendix

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Migration:

Use case questionnaire

Data Cloud Platform

Use Case Name

Information provided by:

Date completed:

Guidance: Please answer each questions with as much detail as possible.

About the use case

Describe the use case.

Are the existing data policies known or easily defined?

☐ Yes ☐ No

Do existing policies need to be refined prior to the migration?

☐ Yes ☐ No

Are there regulations or industry best practices that need to be assessed?

☐ Yes ☐ No

Is there sensitive data involved?

☐ Yes ☐ No

Are there data residency restrictions that need to be taken into account?

☐ Yes ☐ No

List the business units, departments, teams and individual roles that will benefit from this use cause?

What are the hard benefits of this use case that can be measured (e.g., productivity, cost savings)?

Who should be allowed access to the data related to this use case? Provide details if access rights are different based on the user role.

What are the soft benefits of this use case that can be measured (e.g., employee satisfaction)?

What are the data retention policies?

Who will be responsible for measuring and reporting on the hard and soft benefits?

(Use case questionnaire continued)

Guidance: Provide as much information as possible for each data source. Include additional pages if there is more than one data source. You must include at least one data source. If you don't know the answer to a question, state 'unsure.'

Data Source

Existing data source (provide description and location):

Name:

Location:

Description:

Data Owners:

Additional Information

List any additional data stakeholders?

Who will be responsible for certifying and validating the data (if different than the data owner)?

Is the data compatible with the new data cloud platform?

Do metadata connectors between your data governance platform and the source and destination platforms?

Are there existing connectors between the source and destination platforms?

Is sensitive or critical business data stored at the source?

Checklist for building your data migration plan

Guidance: Check off each element once it has been included in your data migration plan for each use case

Select approach

- ☐ Big bang (all-at-once)
- ☐ Trickle (iterative)
- ☐ Hybrid (combination of both)

List roles and responsibilities

- ☐ Data steward
- ☐ Data owner
- ☐ Data engineer
- ☐ Data architect
- ☐ Privacy manager
- ☐ Application owner
- ☐ Business analyst
- ☐ Other
- ☐ Other

List situations that require a contingency plan

- ☐ Loss of skills
- ☐ Loss of subject matter expertise
- ☐ Migration rollback
- ☐ Other
- ☐ Other

Standards for data readiness

- ☐ Glossary with clearly defined terminology related to the data and use case that is important to the business to keep everyone on the same page
- ☐ Sufficient metadata with technical, business and privacy context to enable all stakeholders to find, understand and access trusted data
- ☐ Technical and business lineage that provides end-to-end flow of data, including transformation and usage
- ☐ Data meets quality standards to ensure accuracy, completeness, validity, and consistency
- ☐ Other
- ☐ Other

List critical elements of a post migration audit

- ☐ Compare source and target data—values, formats, volume of tables, columns and rows number of tables
- ☐ Evaluate quality of data—accuracy, completeness, validity, consistency
- ☐ Assess for performance improvements
- ☐ Identify anomalies and perform root-cause analysis
- ☐ Validate sensitive data is protected
- ☐ Other
- ☐ Other

Roles and responsibilities

A few examples of the impact of data migration on various team members

- ☐ Data Steward: Empowers with enhanced data quality and governance capabilities, leading to more efficient management and utilization of data assets.
- ☐ Data Owner: Offers improved data accessibility and control, ensuring strategic and effective use in decision-making processes.
- ☐ Data Engineer: Provides a more streamlined and optimized data infrastructure, enhancing the ability to manage and manipulate large datasets efficiently.
- ☐ Data Architect: Benefits from the opportunity to design and implement more robust, scalable, and efficient data systems aligned with current technological advancements.
- ☐ Privacy Manager: Allows reinforcement of data protection protocols and compliance with privacy regulations, ensuring secure and ethical data management.
- ☐ Application Owner: Brings about improved application performance and data integration, leading to enhanced user experience and operational efficiency.
- ☐ Business Analyst: Gains access to more accurate and comprehensive datasets, leading to deeper insights and more informed business decision-making.

Sample data cloud migration RACI chart

Task/activity	Migration phase	Responsible (R)	Accountable (A)	Consulted (C)	Informed (I)
Project planning	Initiation	Project Manager	Data Architect	Cloud Solution Architect, Business Stakeholders	Project Team, Stakeholders
Current environment assessment	Assessment	Data Architect, IT Team	Data Architect	Cloud Solution Architect	Project Team, Stakeholders
Data classification and prioritization	Assessment	Data Governance Team	Data Governance Team	IT Security, Data Owners	Project Team, Stakeholders
Cloud service selection	Planning	Cloud Solution Architect	IT Manager	Data Architect, Procurement	Project Team, Stakeholders
Data migration strategy definition	Planning	Data Architect	IT Manager	Cloud Solution Architect	Project Team, Stakeholders
Infrastructure readiness	Preparation	IT Team	IT Manager	Cloud Solution Architect	Project Team, Stakeholders
Data preparation and cleansing	Preparation	Data Team	Data Team	IT Team, Data Architect	Project Team, Stakeholders
Migration execution	Execution	Data Team, IT Team	Project Manager	Cloud Solution Architect	Project Team, Stakeholders
Testing and validation	Execution	Testing Team	Project Manager	Data Architect, IT Team	Project Team, Stakeholders
Post-migration optimization	Closure	Cloud Solution Architect	Project Manager	Data Team, IT Team	Project Team, Stakeholders