

The ITSM and CX Platform Migration Readiness Checklist

32 checks across 8 stages that decide whether your platform migration lands in weeks or drags for months. Platform agnostic. Built from real ANZ mid-market rollouts, including a 100-plus location deployment delivered in six weeks.

How to use this: tick what is genuinely done, not what is planned. Count your unticked boxes at the end. The score tells you whether to proceed, prepare, or pause.

1. Business case and stakeholders

Migrations fail in the boardroom before they fail in the tool.

- ☐ A named executive sponsor owns the outcome, not just the budget
- ☐ Success is defined in service metrics such as MTTR, CSAT and deflection, not as "new tool live"
- ☐ Budget covers licences, implementation and training, not licences alone
- ☐ Go-live criteria are agreed in writing before configuration starts
- ☐ Current platform contract end dates are checked so you are not paying for two tools longer than planned

2. Current-state audit

Map how support actually runs today, not how the process document says it runs.

- ☐ Every intake channel is mapped: email, phone, portal, live chat, social, Teams or Slack
- ☐ Ticket categories are reviewed and dead categories are removed before they migrate
- ☐ Your top 20 recurring request types are identified with monthly volumes
- ☐ All integrations are inventoried: SSO, asset data, monitoring, HR, CRM and commerce systems

3. Data migration decisions

Moving everything is the most common and most expensive default.

- ☐ You have decided what moves: open tickets yes, full closed-ticket history rarely
- ☐ Historical tickets have an archive plan, such as read-only export, instead of a bulk import
- ☐ Field mapping between old and new platforms is agreed and documented
- ☐ Privacy obligations for customer data are checked against the Australian Privacy Principles
- ☐ A sample migration is tested before the real cutover

4. Configuration planning

Configure what the team needs, not what the platform has.

- ☐ Phase 1 scope is limited to essentials: forms, SLAs, routing, core automation
- ☐ SLA policies match commitments you actually keep, not aspirations
- ☐ Approval chains map to real authority, not the org chart from 2022
- ☐ Advanced features such as AI agents and orchestration are deferred to Phase 2 with agreed triggers

5. Integrations and automation

Automate by ticket volume, not by what demos well.

- ☐ Single sign-on is configured first, before anything else
- ☐ One source of truth for asset data is decided
- ☐ Automation targets are chosen from your top request types by volume
- ☐ Notification rules are designed to cut noise, not add it

6. Team readiness

Agents who help design the system will use the system.

- ☐ Agents are in the design workshops, not just the training session at the end
- ☐ A champion is nominated for every team or site
- ☐ Training is scheduled in the fortnight before go-live, not months ahead
- ☐ The knowledge base is seeded with your top 20 request types, for agents and for customer self-service

7. Go-live and hypercare

The fortnight after cutover decides adoption.

- ☐ The cutover date avoids your peak periods and major releases
- ☐ A rollback plan exists in writing
- ☐ A hypercare window of at least two weeks is staffed and budgeted
- ☐ Daily triage huddles are booked for week one
- ☐ Old channels auto-reply and redirect to the new intake

8. Measurement

If you do not baseline before cutover, you can never prove the migration worked.

- ☐ Baseline metrics are captured before the switch: volumes, MTTR, CSAT, cost per ticket
- ☐ Dashboards are built before go-live, not after
- ☐ CSAT surveys are switched on from day one
- ☐ A 30, 60 and 90 day review is already in the calendar

Your score: count the unticked boxes

0 to 5 unticked. You are genuinely ready. Lock the plan and set the date.

6 to 15 unticked. Proceed with caution. Close the gaps in sections 1 to 3 before you configure anything.

16 or more unticked. Pause. Signing now means paying to discover these gaps mid-project. Get the plan right first.



"Freshworks suggested KlickFlow and it was obvious early on that they understood how a support operation runs. Our team had never used a helpdesk platform before. Instead of turning on every feature, they took the time to map how we work and set Freshdesk up around that. They gave us a plan, and what they delivered was the plan. Phase 1 was live in six weeks across more than 100 locations. They haven't walked away since either. When we need something changed, they sort it."

Nicole McLaren, Head of Support, National Pharmacies

Counted more than five unticked boxes?

Each one is a risk you would otherwise pay to discover mid-project, when it is most expensive to fix. In a free 30-minute assessment we go through your score, show you which gaps will actually cost you, and which ones you can safely ignore. No pitch. No follow-up sequence. And if you do not need us, we will tell you that too.

Book your free assessment: klickflow.io/free-assessment