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Get ready to soar

How to be a data cloud migration hero

Data cloud migration planning workbook

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Who this workbook is for

This resource is designed specifically for data professionals at organizations committed to successfully migrating data to the cloud.

Whether you're looking to enhance efficiency, scale operations, or leverage the latest in data technology, this workbook will provide you with the insights and tools necessary to make your cloud migration journey smooth and effective.

What will you learn?

In this workbook, you will discover a clear path to initiate and maintain your data cloud migration, including:

- **Choosing the right use case:** Kickstart your migration by identifying the most suitable use cases for your organization. Analyze your needs and priorities, and set a strong foundation for your migration project

- **Keeping your migration on track:** Learn strategies to maintain momentum and keep your migration process aligned with your organizational goals, including managing timelines, resources, and expectations effectively

- **Key elements of a successful migration:** Uncover the critical components that ensure a successful data cloud migration. From data governance to security protocols, you'll learn the essentials you'll want to consider for a seamless transition

By the end of this workbook, you'll not only have a comprehensive understanding of the steps involved in data cloud migration, but also practical insights into executing these steps effectively.

Why migrations are worth the effort

Data cloud migration represents a transformative shift in how organizations manage and utilize data.

1. Enhanced reporting: Experience advanced analytics for deeper insights and data-driven decisions, driving business growth

2. Quicker data access: Enjoy swift data retrieval and manipulation for agile operations, enhancing market dynamics responsiveness and decreasing time-to-market for new products and services

3. Optimized performance: Benefit from faster, more efficient data processes on cloud platforms, boosting team productivity and operational efficiency

4. Reduced costs: Lower overall expenses with scalable, pay-as-you-go cloud services

5. Stronger data security: Gain robust protection with advanced encryption and secure backups, ensuring regulatory compliance and avoiding costly penalties

Why migrations fail

From inadequate planning and insufficient data governance to compatibility issues and flawed security protocols, the reasons for failure are as varied as they are critical. By learning about these challenges, you empower yourself with the foresight and knowledge necessary to avoid common mistakes.

Remember, a true cloud migration hero isn't just defined by success, but by the ability to anticipate and overcome obstacles along the way.

Build your strategic advantage

As a data leader navigating the cloud landscape, you're facing a defining challenge: How do you turn cloud migration from a technical exercise into a catalyst for competitive advantage?

The answer isn't in the mechanics of moving data. It's in how you govern it. Every business unit wants to do more with data. But few organizations are prepared to handle the complexity. Cloud migration amplifies this challenge — and AI only raises the stakes further.

The good news is your deep understanding of the organization's data ecosystem positions you to see the bigger picture. While others focus on immediate technical wins, you recognize that success demands more than better migration tools. It requires unified governance that spans every system, source and user.

This is your opportunity to break free from fragmented governance that tethers control and visibility to specific platforms. By building a foundation where policies apply consistently and business context flows freely, you're not just enabling safer migration — you're accelerating every future data and AI use case.

The organizations that thrive in this new landscape will be those that transform cloud complexity from an operational burden into a strategic accelerator. This playbook shows you how.

Getting started on your migration journey

Ready to embark on your data cloud migration? Now's the perfect time to kick it into high gear. To ensure success, these three areas will be key to your journey:

- **Current state assessment:** Begin by thoroughly evaluating your existing data landscape. This includes understanding your current data infrastructure, usage patterns, and any potential challenges or limitations

- **Planning considerations:** Carefully plan your approach. This involves aligning the migration with your business objectives, engaging stakeholders, and prioritizing critical data sets for migration

- **Measuring success:** Establish clear metrics and benchmarks to evaluate the success of your migration — and align them with your organizational goals. This could range from performance improvements to cost savings and enhanced data accessibility

Focus on these areas when you start and you'll be well-prepared for a successful migration.

Current state assessment

Let's start out with a self-assessment on the current state of your migration efforts. Check all the scenarios that apply or add your own. Prioritize them based on your unique company needs.

1 **List your company's strategic initiatives and expected outcomes**

Sample initiatives and outcomes:

☐ Increase employee productivity   ☐ M&A integration

☐ Reduce compliance risk   ☐

☐ Increase revenue   ☐

☐ Enter into new markets

2 **List the top concerns or challenges you are currently facing with your current infrastructure**

Sample concerns:

☐ Negatively impacting productivity   ☐ Improving data coverage across the org

☐ Increasing regulatory compliance/risk exposure   ☐ Lack of trust in data-driven business decisions

☐ Negatively impacting business agility   ☐

☐ Negatively impacting revenue opportunities   ☐

3 **List any compelling events that can impact timelines of the project**

Sample compelling events:

☐ New or changing regulations   ☐ Expiring budgets

☐ Upcoming mergers or acquisitions   ☐

☐ New applications being onboarded   ☐

4 **List any data sources that are scheduled to be retired or replaced**

☐

☐

Aligning migration use cases with strategic business initiatives

Check all the scenarios that apply or add your own. Prioritize them based on your unique company needs.

1 **List strategic business initiatives where a data cloud migration will have a positive impact**

Sample initiatives and outcomes:

☐ Reduce operating expenses   ☐ Digital transformation

☐ Increase customer retention   ☐ Data monetization

☐ Diversify and grow revenue streams ☐

☐ Improve cross-functional productivity ☐

2 **Identify and prioritize use cases that align with strategic initiatives**

Sample concerns:

☐ Customer 360   ☐ Post-acquisition data consolidation

☐ Regulatory compliance and reporting ☐

☐ Financial reporting   ☐

☐ ESG reporting

3 **Identify any potential risks a data cloud migration could introduce to a strategic initiative**

Sample scenarios:

☐ Incompatibility of existing architecture   ☐ Data security

☐ Lack or loss of skills and subject matter expertise ☐ Data governance and compliance issues

☐ Data loss   ☐

☐ Budget overruns   ☐

Selecting the right use case to get started

Preparing for your data cloud migration journey

Moving forward on your data cloud migration journey is a strategic decision that can significantly enhance your organization's data management capabilities and overall operational efficiency.

However, the key to a successful migration lies in carefully selecting the right use case to begin your journey. Once you've identified priority use cases, we recommend choosing one use case to pilot your strategy and help iron out any kinks along the way.

Here are some example criteria for choosing the right use case:

- Key stakeholders have provided complete and detailed responses to our use case questionnaire

- Lower security and privacy risks

- Source data is highly compatible with target system

- Relevant connectors already exist

- Quick win that could demonstrate measurable impact and/or ROI early in the project

Ask the right questions about each use case

Let's embark on the critical questions that will guide you to a successful data cloud migration. We've included a few sample questions to help you get started. But note that these examples are not exhaustive; your specific questions will reflect the unique state of your organization.

Can you identify all the data sources you need for the use case?

- Where does the data reside

- Is the data compatible with your new data cloud platform

- Are there existing 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

Are the data stakeholders and the benefits to each stakeholder known for the use case?

- Who are the data owners

- Who is needed to validate and certify the data

- Who benefits from the use case and how

Can the use case benefits be measured?

- What are the hard benefits that can be measured

- Are there soft benefits

- How will you measure and report on them

Are the data policies needed for the data assets known or easily defined?

- Do the existing policies need to be refined for a move to the cloud

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

- Is there sensitive data involved

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

- Who should be allowed access to the data

- What are the data retention policies

Can the current source be deprecated, or is there a compelling reason why it should only be copied to the new platform? Note: best practice is to deprecate when possible.

Assessing capabilities required for a successful cloud migration

Successful cloud migration is not just a technological shift, but a comprehensive transformation of technology, skill sets and strategic integrations.

Technology

☐ Cloud infrastructure

☐ Data cloud platform

☐ Data intelligence platform (Explore The essential data intelligence buyer's guide)

☐ Project management

☐ Other

☐ Other

Integrations

☐ CRM

☐ HR and payroll

☐ Finance

☐ ERP

☐ Project management

☐ Marketing automation

☐ Inventory management

☐ Business intelligence tools

☐ Data warehouses

☐ ETL/ELT tools

☐ Third-party data providers

☐ Technical/platform catalogs

☐ Other

☐ Other

Skillsets

☐ Project management

☐ Change management

☐ Data engineering

☐ Data security

☐ Solution architecture

☐ Stewardship

☐ Cloud infrastructure

☐ Legal and compliance

☐ Analytics

☐ Other

☐ Other

Knowing your global stakeholders and what they care about

In any large-scale endeavor like cloud migration, understanding and actively engaging with your global stakeholders is not just beneficial — it's essential. These leaders will provide critical oversight across various business areas. Recognizing what matters to each of them is key to aligning the migration strategy with the organization's broader objectives. You will need escalation paths when issues arise that impact their area. They will want regular progress reports on how things are going – project timeline, ROI, adoption, risks, issues, etc.

List the global key stakeholders and what matters most to them.

☐ Chief Data Officer

Concerns

☐ Business Leaders

Concerns

☐ Chief Information Officer

Concerns

☐ Other

Concerns

☐ Chief Technology Officer

Concerns

☐ Other

Concerns

☐ Project Manager

Concerns

☐ Other

Concerns

Measuring success

Measuring success in your data cloud migration is crucial for validating the effectiveness of the transition and ensuring alignment with your organizational goals. This step includes tracking the migration process — and quantifying the impact and value the migration brings to your organization. Establishing clear Key Performance Indicators (KPIs) provides tangible metrics for measuring success, offering insights into areas of improvement and achievement.

What KPIs will you use to measure success? Which will you use to track your process? Be sure you can measure them before and after the migration.

☐ Number of data sources or datasets migrated

☐ Number of datasets deprecated

☐ Number of security incidents

☐ Improved compliance with regulations

☐ Application response times

☐ Number of inquiries about data

☐ Average downtime

☐ Cost savings - infrastructure savings

☐ Cost savings - time spent

☐ User adoption

☐ Reduce latency of data

☐ Other

☐ Other

Put your data cloud migration journey on track from the start

Setting your data cloud migration journey on the right track from the start is crucial. This initial phase lays the groundwork for a smooth transition, ensuring strategic alignment and effective execution throughout the migration process.

Follow these four key pillars to ensure a smooth, strategic transition to the cloud:

Get organizational buy-in

Establish an effective change management plan

Build a comprehensive migration plan

Create a well-defined operating model and policy strategy

Gaining organizational buy-in

Embracing data cloud migration is a pivotal step towards digital transformation that requires organizational buy-in to unlock its full potential. Without it, the journey toward data cloud migration risks stalling, potentially leaving you and your business falling behind the competition.

Why it matters

Executive Level

- ☐ Ensures alignment with strategic initiatives of the business

- ☐ Gains commitment for resources and funds

- ☐ Supports Top-down communication to drive action and priority

- ☐ Helps identify executive sponsorship to provide credibility, gather cross-functional support, communicate goals, and act as an advocate

Business and technical stakeholder alignment (and enthusiasm) on priority use cases. They should

- ☐ Be open to being an early adopter and acting as an evangelist for the project

- ☐ Have right level of subject matter expertise or willingness to dig and learn

- ☐ Have the time to dedicate to the project

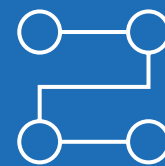### Candidates for executive sponsorship

Name and Title

Name and Title

Name and Title

List desired characteristics of business and technical stakeholders

☐ Entrepreneurial or trailblazer spirit	☐ Responsive
☐ Well-respected cross functionally	☐ Uses time efficiently
☐ Subject matter expertise	☐ Other
☐ Proactive	☐ Other

Establishing effective change management

At the heart of every successful data cloud migration lies effective change management. This strategy is critical not just for the technical shift, but for ensuring user adoption and maximizing the return on investment (ROI) of the project. Understanding how stakeholders currently accomplish their tasks and how this will transform post-migration is key to a seamless transition.

How will people be trained on the new technology as well as new or changing processes?

- ☐ Online training
- ☐ Train the trainer
- ☐ Demonstrations
- ☐ Job Aids
- ☐ Certifications
- ☐ Other
- ☐ Other

How will you promote/communicate the value of the change?

- ☐ Internal newsletters
- ☐ Intranets postings
- ☐ Email communications
- ☐ Video testimonials
- ☐ Presentations at team and leadership meetings
- ☐ Other
- ☐ Other

How will you monitor progress and adoption?

Benchmark time spent on various activities before and after the migration

- ☐ Looking for data
- ☐ Understanding data
- ☐ Gaining access to data
- ☐ Monitoring data quality
- ☐ Other
- ☐ Other

User satisfaction surveys

- ☐ Ease of use
- ☐ Roll-out strategy
- ☐ Training programs and materials
- ☐ Communications
- ☐ Other
- ☐ Other

Usage analytics

- ☐ Number of unique logins
- ☐ Number of logins
- ☐ Number of business users vs technical users
- ☐ Number of data access requests

Building a comprehensive data migration plan in 4 steps

In this phase, you'll define your data migration approach, setting priorities, roles, and a realistic roadmap with contingency plans. Remember to focus on clear communication in this phase to ensure a smooth transition and successful post-migration audit.

1 **Define the scope**

- Decide if you'll take a big bang approach, an iterative or agile approach, or a hybrid approach
- Prioritize the migration use cases you identified at the beginning of the journey
- Identify the required connections to sources and tables for each use case

2 **Set clear expectations for all stakeholders**

- Develop a RACI (Responsible, Accountable, Consulted, Informed) chart to ensure everyone understands their roles and responsibilities. Check out our sample RACI in the appendix to help get you started.
- Create a roadmap and rollout plan for each use case and data source.
- Set realistic timelines and milestones for each phase of the migration project
- Define standards for data migration readiness
- Communicate the change management plan
- Confirm stakeholder agreement on expectations

3 **Determine required contingency plans, such as:**

- Unexpected loss of critical skills and subject matter expertise (e.g. cross-training, consultants, etc.)
- Migration rollback in the event of data loss, unanticipated changes to the data, errors encountered during the migration, or other similar situations

4 **Create a post-migration audit plan**

- Before retiring the source system
- To confirm that data was migrated successfully
- To ensure policies are accurately applied

Ready to start your plan?

To make the migration process easier and more efficient, we've developed a comprehensive checklist tailored to guide you through each step of your plan.

Get our helpful checklist for building your data migration plan.

Defining the operating model and guidelines for policy strategy

An operating model and policy strategy are blueprints for achieving your organizational goals. So it's important to decide on the type of data governance operating model that will work for your organization.

Consider the range of unique needs for your organization and balance them against the need for standardization and consistency. The three main types of organizational models are:

☐ **Centralized** - central authority determines the rules of how to govern and individuals and teams executing data governance must adhere to centrally defined processes

- Introduces consistency and reduces confusion

- Less risk of duplication of effort – increasing productivity

- May be appropriate for highly regulated organizations

- May not account for unique data governance needs for different parts of the organization

- Bottlenecks to gain access can delay access of business insights

☐ **Decentralized** - multiple groups of authority; most often adopted if different teams with different data governance needs

- Puts data governance policy and definitions closer to the subject matter experts, but could result in a disconnect from business objectives

- Improved representation from the business

- Runs the risk of duplication of data and inconsistencies around policies

☐ **Federated** - balances the restrictiveness of a central governance authority that may not account for the unique needs of various groups while also providing best practices and standards that provide consistency and reduce complexity.

Defining clear roles and responsibilities for your chosen operating model is essential for driving accountability and aligning data governance with your business objectives. In addition, establishing robust data standards and usage guidelines is critical for maintaining the integrity and trustworthiness of your data, forming the foundation for your approach to data sharing, reusability and comprehensive governance.

Defining the operating model and guidelines for policy strategy

Efficient and effective policy development is anchored in an understanding of your unique access standards and stewardship model. Focus on the following critical areas as you craft your policy strategy.stency. The three main types of organizational models are:

Policy strategy

Establish standards for access policies based on applicable regulations and best practices

☐ Who can access each table?

☐ Who should be able to see sensitive data?

☐ Are there data residency restrictions?

☐ What are the data retention policies?

☐ Can the data be shared outside of the organization?

☐ Other

☐ Other

Decide on the stewardship model:

☐ Subject area (for example - products, customers, financials)

☐ Function (for example - marketing, sales, customer support)

☐ Business Process (for example - campaigns, procurement, sales)

☐ Systems (for example - CRM, project management, human resources)

☐ Other

☐ Other

Be the hero of your data cloud journey

Cloud migration isn't an endpoint — it's an ongoing opportunity to transform how your organization activates data. The challenge isn't just moving data from point A to point B. It's about building the foundation for accelerating every data and AI use case, safely and confidently.
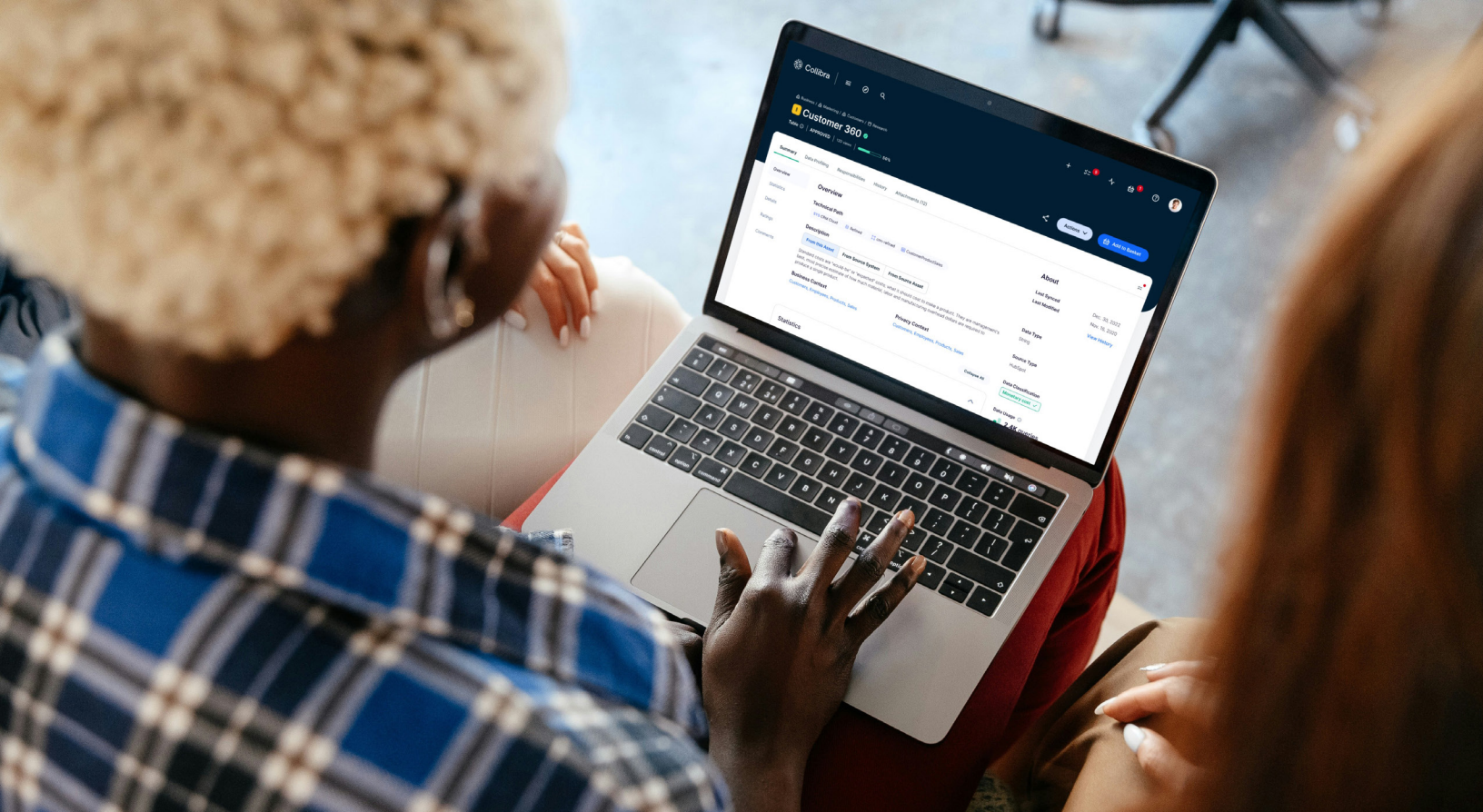
You see, the organizations that thrive aren't just investing in better migration tools. They're reimagining governance for a multi-cloud world where data flows freely, policies apply consistently and business context enriches every interaction. They're turning fragmentation into unification, complexity into clarity and governance into a catalyst for speed.

Your cloud journey is a chance to break free from the constraints of fragmented governance. When you unify visibility and control across every system, source and user, you create the conditions for sustainable innovation. Your people can trust, comply and consume data confidently across every environment. That's not just better governance — it's competitive advantage.

The future belongs to organizations that can turn cloud complexity into strategic edge. With unified governance as your foundation, you're ready to accelerate every data and AI initiative while maintaining control and trust.

That's Data Confidence.

Power your data cloud migration with Collibra

Learn more

Get more details on how Collibra can power your data cloud migration with data intelligence.

www.collibra.com/migration

Get advice

Book a Collibra Coaching session to gain access to technical guidance or best practices on how Collibra supports your data cloud migration.

www.collibra.com/coaching

Get started

Engage top industry experts on Collibra's Professional Services team to help you unlock the full potential of your data cloud migration.

collibra.com/professional-services

Appendix: Templates

Migration:

Data Cloud Platform

Use case questionnaire

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.

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)?

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

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

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

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 data retention policies?

(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

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