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Risetime

COMPANION CHECKLIST

THE INTELLIGENT MIGRATION CHECKLIST

Know what you have. Decide what matters. Clean up what doesn't. Move what deserves to move.

Use this checklist to assess your organization's readiness for a migration, modernization, consolidation, or repository cleanup. You don't need to have all the answers. If a question stumps you, that's a signal, not a failure: You just need an honest picture of the gaps. That's genuinely enough to turn “I don't know where to start” into a real first conversation. **The things you don't know are often the most important findings.**

HOW TO USE THIS CHECKLIST

Work through the questions with the people who know your content environment:

01 IT / Infrastructure

02 DAM / ECM / Document Management

03 Records Management

04 Information Governance

05 Legal / Compliance

06 Business owners

07 Content creators and users

For each question, mark:

- ☑ **YES —** We know and have documented the answer
- ☑ **PARTIAL —** We have an answer, but it isn't complete or consistent
- ☒ **NO —** We don't currently know
- ☐ **N/A —** Not applicable

One important rule: “We don't know” is a useful answer.

Unknown content, unknown ownership, unknown retention, and unknown dependencies are exactly the kinds of issues an Intelligent Migration process is designed to uncover.

STEP 1 — DISCOVER

Find the Content

Before you can decide what to migrate, you need to know what you have.

Where does our content live?

- ☐ We have identified all major content repositories.
- ☐ We know which legacy systems contain content that may need to be migrated.
- ☐ We know which shared/network drives contain business content.
- ☐ We know where departmental or personal repositories are being used.
- ☐ We know what content exists in cloud repositories.
- ☐ We know whether paper records are part of the migration effort.
- ☐ We have identified content created or acquired through mergers and acquisitions.
- ☐ We know whether multiple repositories contain overlapping content.

What do we know about the content?

- ☐ We know approximately how much content exists, a rough sense of total volume
- ☐ We know the number of files/documents/assets.
- ☐ We understand the major file types and formats.
- ☐ We understand the age of the content.
- ☐ We know which content is actively used.
- ☐ We know which content is rarely or never accessed.
- ☐ We know who owns the major content collections.
- ☐ We know which repositories are authoritative.
- ☐ We know where duplicate content exists.
- ☐ We have identified known compliance-sensitive content.

Discovery Check

How much of your content environment can you confidently describe?

- ☐ Almost all
- ☐ Most
- ☐ Some
- ☐ Very little
- ☐ We don't know yet

STEP 2 — DIGITIZE

Don't Forget the Paper

Some migration projects begin before the content is even digital.

Paper and scanned content

- ☐ We know approximately how much paper content exists.
- ☐ We know which paper records have continuing business value.
- ☐ We know which paper records are subject to retention requirements.
- ☐ We have identified documents that need to be digitized.
- ☐ Scanned documents are searchable.
- ☐ OCR has been applied where appropriate.
- ☐ Digitized documents have meaningful metadata.
- ☐ We can identify the document type of scanned content.
- ☐ Digitized content can be incorporated into the target repository.
- ☐ We have considered how paper content fits into the overall information architecture.

Digitization Check

Is digitization currently viewed primarily as:

- ☐ Scanning
- ☐ Scanning + OCR
- ☐ Converting paper into managed digital records
- ☐ We haven't defined this yet

Remember: A scan isn't necessarily a usable digital record.

STEP 3 — INTELLIGENTLY SORT

Understand Before You Move

This is where Intelligent Migration moves beyond traditional lift-and-shift migration.

For each major content population, ask:

What is it?

- ☐ We can identify the major document/content types.
- ☐ We understand the business purpose of the content.
- ☐ We know what business process created it.
- ☐ We understand how users currently work with it.
- ☐ We understand how frequently it is used.
- ☐ We can identify duplicates.
- ☐ We can identify obsolete or expired content.
- ☐ We can identify sensitive content.
- ☐ We understand relationships between related documents/content.
- ☐ We know what metadata exists—and what is missing.

THE FOUR-WAY INTELLIGENT SORT

Once content has been understood, it can move into four decision paths.

01 KEEP — Migrate & Govern

Content that has ongoing business, operational, strategic, or required value.

- ☐ We know what content needs to move.
- ☐ We know why it needs to move.
- ☐ We know who owns it.
- ☐ We know where it belongs in the target environment.
- ☐ We know what metadata it needs.
- ☐ We know who should have access.
- ☐ We understand its retention requirements.

Decision: Keep it — but put it somewhere intentional.

02 CLEAN — Remediate, Enrich, Archive or Migrate

Content that has value but needs work before it becomes useful.

- ☐ We have identified duplicate content.
- ☐ We have identified content with missing metadata.
- ☐ We have identified inconsistent naming or classification.
- ☐ We have identified obsolete formats.
- ☐ We have identified content that needs conversion.
- ☐ We have identified content that should be archived rather than actively migrated.
- ☐ We have identified content that needs restructuring.
- ☐ We have identified content that requires metadata enrichment.

Decision: Don't move the problem. Fix it as part of the migration.

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03 REVIEW — Business / Records / Legal Decision

Content where the organization needs more information or an accountable decision

- ☐ We have identified content with unknown ownership.
- ☐ We have identified content with unclear business value.
- ☐ We have identified content with unclear retention requirements.
- ☐ We have identified potentially sensitive content.
- ☐ We have identified content that may be subject to legal requirements or holds.
- ☐ We have a process for escalating uncertain content.
- ☐ We know who is authorized to make these decisions.

Decision: When the answer isn't clear, don't guess. Route it to the right decision maker.

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04 DISPOSE — Authorized Disposition

Content determined to be eligible for disposition under approved policies and requirements.

- ☐ We have identified confirmed duplicates.
- ☐ We have identified expired or obsolete content.
- ☐ We have identified temporary or transitory content.
- ☐ We understand applicable retention requirements.
- ☐ Legal holds and other restrictions have been considered.
- ☐ An accountable person or function can authorize disposition.
- ☐ We can document what was disposed of and why.

Decision: Don't keep unnecessary content—but don't dispose of it without an authorized decision.

04

STEP 4 — TRANSFORM

Build a Better Environment on the Other Side

Migration shouldn't simply recreate the old environment on a new platform.

Taxonomy & Metadata

- □ We have defined or reviewed the target taxonomy.
- □ Metadata requirements are documented.
- □ Business terminology is understood.
- □ Organizational acronyms and terminology have been accounted for.
- □ Metadata can be populated consistently during migration.
- □ Users will be able to search and filter content effectively.

Governance

- □ Content ownership is defined.
- □ Records responsibilities are defined.
- □ Retention requirements are understood.
- □ Access and permissions are defined.
- □ Naming/classification standards are documented.
- □ There is a process for managing future content.

Search & User Experience

- □ Users can find the content they need today.
- □ We know where search currently fails.
- □ We know what users expect to find.
- □ The target environment has been designed around user needs.
- □ Users will be able to identify authoritative/current content.

Workflows & Processes

- □ We understand the business processes connected to the content.
- □ Existing workflows have been documented.
- □ We have identified processes that should be improved rather than simply replicated.
- □ The migration supports future-state workflows.

STEP 5 — MIGRATE

Move in Waves, Not a Big Bang

Migration should move the right content to the right place in the right condition.

Planning

- □ Content has been grouped into logical migration populations.
- □ We have identified a representative pilot population.
- □ Migration dependencies are understood.
- □ Business owners have been identified.
- □ Migration success criteria have been defined.
- □ We have a validation process.
- □ We have a rollback/recovery plan.
- □ Users understand what will change.

During Migration

- □ Content is validated before being considered successfully migrated.
- □ Metadata is validated.
- □ Permissions are validated.
- □ Searchability is validated.
- □ Business owners participate in validation.
- □ Migration issues are documented and resolved.
- □ Lessons from early waves are incorporated into later waves.

Migration Check

Can you answer this question confidently?

"If we moved this content tomorrow, how would we know we moved the right things to the right place in the right condition?"

- □ Yes
- □ Partially
- □ No

STEP 6 — SUSTAIN

Don't Create the Next Mess

A successful migration isn't the end of the process. The sort gets you to a better environment. Governance is what keeps you there.

After Go-Live

- ☐ Content ownership remains clear.
- ☐ New content follows established standards.
- ☐ Metadata remains consistent.
- ☐ Retention policies are maintained.
- ☐ ROT is periodically reviewed.
- ☐ Duplicate content is addressed.
- ☐ Users understand where content belongs.
- ☐ Users know how to find content.
- ☐ Governance responsibilities are actively managed.
- ☐ We have metrics to measure whether the new environment is performing.

What will we measure?

- ☐ Search success
- ☐ Time to find content
- ☐ Content reuse
- ☐ Duplicate reduction
- ☐ Storage reduction
- ☐ Repository retirement
- ☐ User adoption
- ☐ Metadata quality
- ☐ Governance compliance
- ☐ Other: _____

YOUR INTELLIGENT MIGRATION SNAPSHOT

Now step back and look at the results.

01 DISCOVER

How well do we understand what we have?

- □ Strong
- □ Moderate
- □ Limited
- □ Unknown

02 DIGITIZE

How prepared is our paper/scanned content?

- □ Strong
- □ Moderate
- □ Limited
- □ Unknown

03 SORT

How confidently can we determine what should happen to our content?

- □ Strong
- □ Moderate
- □ Limited
- □ Unknown

04 TRANSFORM

How well-defined is our future information environment?

- □ Strong
- □ Moderate
- □ Limited
- □ Unknown

03 MIGRATE

How prepared are we to execute and validate the move?

- □ Strong
- □ Moderate
- □ Limited
- □ Unknown

04 SUSTAIN

How prepared are we to govern the environment after migration?

- □ Strong
- □ Moderate
- □ Limited
- □ Unknown

THE QUESTIONS WE DON'T KNOW

This may be the most valuable page in the checklist.

Complete the following:

The content we know the least about:

_____

The repository we are most concerned about:

_____

The content we suspect is duplicated:

_____

The content we don't know who owns:

_____

The content we are uncertain about retaining:

_____

The paper/scanned content we haven't addressed:

_____

The metadata we know is missing or unreliable:

_____

The biggest user complaint today:

_____

The biggest migration risk we see:

_____

The decision we can't currently make because we don't have enough information:

_____

OUR BIGGEST INTELLIGENT MIGRATION QUESTIONS

What are the three questions your team most wants answered.

QUESTION 1

QUESTION 2

QUESTION 3

WHAT HAPPENS NEXT?

You don't have to solve the whole mess before you start.

The purpose of this checklist isn't to produce a perfect migration plan. It's to help you see what you know, what you don't know, and where the real work is hiding.

That's where an Intelligent Migration conversation begins.

Bring your completed checklist to Risetime.

Together, we can look at:

01

WHAT YOU HAVE
What content exists and where it lives.

02

WHAT IT MEANS
What the content is, who uses it, who owns it, and why it matters.

03

WHAT SHOULD HAPPEN
Keep. Clean. Review. Dispose.

04

WHERE IT SHOULD GO
How content should fit into the future environment.

05

HOW TO GET THERE
A practical migration approach based on your content—not assumptions.

THE RISETIME DIFFERENCE

We Don't Just Move Content. We Help Make Sense of It.

DISCOVER

Find the content—wherever it's hiding.

DIGITIZE

Turn valuable paper records into usable digital content.

INTELLIGENTLY SORT

Use automation and AI to identify patterns, duplicates, document types, relationships, and metadata—while keeping people in the decision loop.

TRANSFORM

Build a better environment with the taxonomy, metadata, governance, search, structure, and workflows needed to make content work.

Our approach:

Mess → Understand → Decide → Govern → Transform → Migrate → Sustain

Because the goal isn't simply to get to a clean new house.
The goal is to get to a governed information environment.

It's not just transportation. It's transformation.