

Migration Playbook Checklist

A minimum viable framework for reliable transformation delivery. From the Tidal Enterprise Modernization Methodology™.

Mandate and scope

- ☐ Business reason for the change documented
- ☐ Applications and environments in scope defined
- ☐ Transformation method chosen (rehost, replatform, refactor, replace, retire)
- ☐ Customer and business impacts identified
- ☐ Expected benefits defined with measurable success criteria
- ☐ Change window and constraints documented

Roles and decision rights

- ☐ Executive sponsor identified
- ☐ Business owner or executive identified
- ☐ Migration or modernization lead identified
- ☐ Technical lead identified
- ☐ Release or deployment lead identified
- ☐ Communications lead identified
- ☐ Business and technical testers identified
- ☐ Steady-state support owners identified
- ☐ Escalation paths defined
- ☐ Backout decision authority defined

Readiness

- ☐ Change approval secured
- ☐ Architecture, security, and compliance approvals secured
- ☐ Dependency readiness confirmed

- ☐ Freeze or restriction windows communicated
- ☐ Access and credentials tested
- ☐ Data synchronization planned
- ☐ Monitoring and support readiness confirmed
- ☐ Go or no-go review completed

Execution

- ☐ Pre-change tasks completed
- ☐ Ordered execution sequence documented with owners
- ☐ Commands and scripts referenced as version-controlled artifacts
- ☐ Checkpoints and decision gates defined
- ☐ Validation steps defined
- ☐ Business communications scheduled

Testing, backout, and stabilization

- ☐ Pre-defined test cases documented
- ☐ Issue-reporting template prepared
- ☐ Triage ownership defined
- ☐ Backout triggers defined
- ☐ Backout decision authority defined
- ☐ Known-good recovery state documented
- ☐ Time remaining for backout within the change window calculated
- ☐ Hypercare or stabilization period defined
- ☐ Help-desk routing confirmed
- ☐ CMDB and configuration updates planned
- ☐ Stabilization exit criteria defined

After the change

- ☐ Lessons-learned session scheduled
- ☐ Actual versus planned duration and cost measured
- ☐ Defects and issues reviewed for trends
- ☐ Improvements documented for the next wave