

# SUCCESSFUL MODERN PSA MIGRATION AND IMPLEMENTATION CHECKLIST

Moving or implementing a modern PSA is no walk in the park. There are many different functions in your business that are involved in migrating to a new PSA since your PSA touches all parts of your business from service desk and project management to administration and billing.

Having the right approach and a robust migration strategy is the best way to avoid obstacles, decrease risks and put you in control.

Here's a checklist that you must follow to ensure successful migration and implementation of a modern PSA solution.



## COMPANY

Let's look at some of the major aspects of successful PSA migration and implementation on an organizational level:



### 1- ROLES:

Define the responsibilities of each role during migration and implementation:

- › Technician
- › Service desk manager
- › Administration
- › Project manager
- › Executive team
- › Vendor professional services and migration team



### 2- CULTURAL SHIFT:

Understand that organizational culture plays a pivotal role in making any implementation successful



### 3- Assemble an implementation



4- Ensure the project receives appropriate resources



### 5- Assign a project champion



6- Oversee administrative details and manage conflicting priorities



## BUSINESS PROCESS

You must create a robust business strategy to outline the processes involved in PSA migration. Here are the steps to create a strong business strategy:



1- Create a blueprint of your desired PSA environment



2- Document the outcomes you are looking for:

- › Document key business scenarios, expectations and desired outcomes after implementation



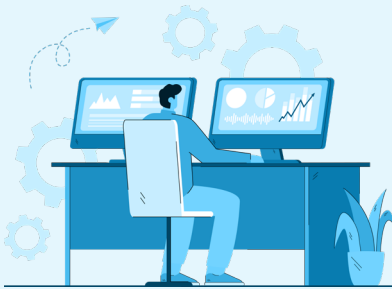
### 3- HERE ARE THE TWO OPTIONS FOR OUTLIING YOUR BUSINESS PROCESSES:

#### a) Complete redesign:

- Pros: Design your entire business process and workflow based on your desired outcomes that fit with your current and future requirements
- Cons: More complex, time-consuming and costly

#### b) Lift-and-shift-only approach:

- Pros: Setting up your existing processes in the new platform takes fewer resources and less time to execute
- Cons: Lacks the benefits of redesigning based on current and future requirements, and lacks the benefit of scalability and flexibility with a modernized PSA



## DATA MIGRATION

Plan in advance to migrate your critical business data from your existing PSA solution to your new PSA solution.



1- Audit your existing PSA data



2- Rectify any data issues found in existing PSA data



3- Identify what data needs to be migrated to the new PSA environment



4- Identify what data doesn't need to be migrated, but needs to be stored for future reference



5- Establish methods to migrate the data to the new PSA environment:

- In-house
- Third-party consultants
- Vendor white-glove service



6- Verify all critical data is migrated





## ROLLOUT STRATEGY

Define your strategy for the final rollout of the new PSA solution. You must:

- 1- Define the project timeline and document any project concerns

- 2- Conduct a live test:  
Audit the business process setup with real data to ensure accuracy of the implementation

- 3- IDENTIFY YOUR ROLLOUT STRATEGY:

- a) "Big Bang" rollout:

- › Full transfer is completed and the old system is no longer accessible by users
    - › Recognize that the pressure can be intense, but all users are forced to adapt and learn the new system, speeding up adoption and return-on-investment on the new system

- b) "Phased-In" rollout:

- › Migration process completion is in phases
    - › The old system and the new system run in parallel



## SUCCESSFUL ROLLOUT

Once you have migrated to the new PSA, you must now ensure that your employees are adept at using it and making the most of it to drive ROI.

- 1- Give everyone a high-five and acknowledge all the work that has been done

- 2- Fine-tune the tool to fit your requirements as you go

- 3- Train all employees to use the new tool:

- › Tailor training sessions for all types of learners by providing a range of material and options
  - › Make the training personal by communicating the company's implementation vision and how the new implementation will enhance their day-to-day work
  - › Solicit feedback from users at every stage of the implementation
  - › Gamify the training to make the rollout fun

**DEMAND MORE FROM YOUR PSA. DON'T LET MIGRATION STAND IN YOUR WAY OF UNLEASHING YOUR BUSINESS GROWTH POTENTIAL WITH KASEYA BMS.**

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