SaaS Data Migration Checklist

- [ ] Evaluate Current Payment Solution: Identify pain points, must-have features, budget, and future needs.

- [ ] Document specific needs for a new payment provider.

- [ ] Explore potential providers based on defined requirements.

- [ ] Check for diverse payment methods (in-app, mobile wallets, etc.).

- [ ] Evaluate Sales Tax Management: Determine if the provider offers automated sales tax tools.

- [ ] Check Customer Support for availability and quality of customer support.

- [ ] Assess Customer Portal Features: Evaluate self-service capabilities for customers.

- [ ] Consider Additional Features: Look for value-added features (affiliate management, etc.).

- [ ] Confirm Integration Options: Ensure seamless integration with existing systems.

- [ ] Verify Subscription Management: Check for robust recurring billing and subscription migration tools.

- [ ] Develop Migration Timeline: Establish a realistic timeline for each migration stage.

- [ ] Plan System Updates: Outline necessary updates to website, checkout, and integrations.

- [ ] Create Testing Plan: Define thorough testing procedures for all systems.

- [ ] Establish Communication Strategy: Develop a plan to inform customers about the change.

- [ ] Conduct Data Inventory: Identify and document all customer data for migration.

- [ ] Perform Data Mapping: Map data fields between old and new provider systems.

- [ ] Execute Data Extraction: Export data from the current provider in a secure format.

- [ ] Perform Data Cleansing: Clean and validate data before importing.

- [ ] Execute Data Import: Import data into the new provider's system.

- [ ] Conduct Data Validation and accuracy in the new system after import.

- [ ] Prioritize Data Security: Ensure data encryption and compliance with privacy regulations.

- [ ] Coordinate Migration Timing: Align migration with old and new providers to minimize downtime.

- [ ] Conduct Testing in Staging: Test the migration process in a staging environment.

- [ ] Develop Rollback Plan: Create a plan to revert to the old system if issues arise.

- [ ] Communicate Switch Reasons: Explain the reasons for the change to customers.

- [ ] Outline Expected Changes that customers may experience.

- [ ] Provide Support Channels: Offer multiple support options for customer inquiries.

- [ ] Customize Checkout Page: Optimize the checkout page for conversions and branding.

- [ ] Configure Products and Pricing: Ensure all products and pricing are correctly set up.

- [ ] Customize Checkout Page: Optimize the checkout page for conversions and branding.