B2B SaaS Customer Migration Checklist & Planning Template

A working template for moving your B2B customer base to a new SaaS platform — a companion resource for the guide “How to Migrate B2B Customers to Your New SaaS Platform.” Fill in each section as you plan, and check off items as your team completes them.

Step 1: Define Scope & Timeline

- [ ] List every system component that changes: billing logic, user roles, integrations, reporting, legacy configurations.
- [ ] Document parity gaps — features on the old platform without a current equivalent on the new one.
- [ ] Set a target migration window (typical range: 3–9 months).
- [ ] Identify which parity gaps must close before any cohort can move, and which can wait.

Self-check: does the new platform fully support every billing cycle, contract type, and integration your active base currently uses? If not for a segment, that segment moves later, not earlier.

Step 2: Segment Customers into Migration Cohorts

Assign each customer segment to a cohort and a planned order.

Cohort A — New-to-new customers (1st, test base)

Migration order:

Target start / complete:

Cohort B — Power users, simple setup (2nd)

Migration order:

Target start / complete:

Cohort C — Legacy / complex accounts (3rd)

Migration order:

Target start / complete:

Cohort D — Contract-locked accounts (4th)

Migration order:

Target start / complete:

- [ ] Route new signups to the new platform first as a live test group.
- [ ] Rank remaining accounts by platform-capability match and account complexity.
- [ ] Confirm each cohort's contract type and billing cycle is supported before scheduling.

Step 3: Build a Communication Plan

- [ ] Email notice sent ahead of each cohort's migration window.
- [ ] In-product banner live for affected accounts.
- [ ] Dedicated FAQ / status page published as the single source of truth.
- [ ] Short explainer video prepared (if the change affects daily workflows).
- [ ] Customer success team briefed with talking points and escalation path.
- [ ] Public changelog or townhall scheduled for recurring questions.

Step 4: Test in a Staging Environment

- [ ] Full dry migration run using a copy of production data.
- [ ] Data-mapping errors logged and resolved.
- [ ] Integrations and permissions verified in staging.
- [ ] New parity gaps discovered in testing logged and assigned an owner.

- [ ] Sign-off recorded before the first live cohort moves.

Step 5: Migrate Data & Validate

- [ ] Data transferred using an encrypted, auditable process.
- [ ] Validation checkpoint completed: immediately after transfer.
- [ ] Validation checkpoint completed: 24–48 hours after transfer.
- [ ] Validation checkpoint completed: 30 days after transfer.
- [ ] Old platform set to read-only for at least 30 days after each cohort's cutover.

Step 6: Run a Phased Cutover

Track each cohort's cutover status.

Cohort A

Cutover date:

Support readiness / rollback plan:

Cohort B

Cutover date:

Support readiness / rollback plan:

Cohort C

Cutover date:

Support readiness / rollback plan:

Cohort D

Cutover date:

Support readiness / rollback plan:

- [ ] Cutover order starts with the cohort with fewest custom configurations and highest platform match.

- [ ] Lessons from each cohort's migration applied before the next cohort moves.
- [ ] Temporary bridges identified for hard-to-move accounts (extended trial, waived overlap fees, adjusted pricing).

Step 7: Support Customers Through Adoption

- [ ] Every integration, API connection, and plugin confirmed active before marking an account migrated.
- [ ] Customer success check-ins scheduled for high-complexity accounts.
- [ ] Known issues and workarounds documented for the support team.

Step 8: Monitor & Close Out

- [ ] 30-day post-migration monitoring window tracked per cohort.
- [ ] Support ticket volume by cohort logged.
- [ ] Data validation results confirmed clean.
- [ ] Rollback requests logged and reviewed.
- [ ] Cohort formally marked migration-complete.
- [ ] Process notes captured to refine the plan for the next cohort.

Companion resource for: “How to Migrate B2B Customers to Your New SaaS Platform: A Step-by-Step Guide”.