



HR Software Migration & Implementation Toolkit

**Your practical guide to a smooth
HR system transition**

Migrating to a new HRIS can feel like a major project. But with the right preparation and a structured approach, most HR data migrations are simpler and faster than expected.

This toolkit helps you:

- assess your migration readiness
- understand the typical migration timeline
- follow a clear migration roadmap
- track progress with a practical checklist

Feel free to use it as a planning tool to organize your migration step by step.



HRIS Migration Readiness Assessment

Before starting a migration project, it helps to evaluate how prepared your organization is. For each statement, check the option that best reflects your situation.

Data

- Our employee data is centralized in one or a few systems
- We know all the sources where HR data currently exists
- Our employee records are generally clean and up to date
- We have a clear idea of which data needs to be migrated

Process

- We understand the main steps involved in HRIS migration
- We have identified an internal owner for the project
- We have started thinking about migration timelines

Organization

- Key stakeholders are identified (HR, IT, leadership)
- We have considered how the change will impact employees
- We plan to communicate internally about the new system

Your Migration Readiness Score

Count the number of boxes checked to get your score:

0-3 → Early stage

Your organization is still exploring HR system migration.

4-7 → Preparing for migration

You are starting to structure your migration project.

8-10 → Ready to move forward

You are well positioned to begin the migration process.

The HRIS Migration in 4 Simple Steps

A structured migration usually follows five key phases.

1

Clean your data

Review and clean existing employee data before migration.

2

Map your fields

Match your current data structure with the fields in your new HRIS.

3

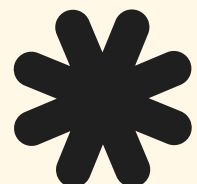
Configure the system

Set roles, permissions, workflows, and organizational structure.

4

Launch and optimize

Go live and validate the system with real users.



Typical HRIS Migration Timeline

Most HRIS migrations follow a relatively short and structured timeline.

Phase	Typical Duration
Data review & cleanup	1-2 weeks
Data mapping	1-2 weeks
Configuration & validation	1-2 weeks
Go-live preparation	1-2 weeks

Typical total migration timeline: 4–8 weeks



Actual timelines vary depending on data complexity and organizational size. The speed of implementation also depends on the availability of your teams: in most cases, organizations do not have a resource available to work full-time on the migration project.

HRIS Migration Checklist

Use this checklist to track your progress during the migration.

1. Define the Migration Scope

- Identify all current data sources (*HR systems, spreadsheets, payroll tools, shared drives*)
- List all categories of employee data currently stored
- Decide which historical data should be migrated
- Identify data that should be archived instead of transferred
- Confirm the data needed for daily HR operations

Notes

Migration Owner

2. Review and Clean Existing Data

- Check employee records for duplicates
- Confirm that all active employees are listed correctly
- Remove outdated or inactive employee records
- Identify missing mandatory fields (*email, job title, start date, manager*)
- Standardize department names and job titles
- Validate balances such as time off if applicable

3. Prepare Data Mapping

- Export data from current systems
- Review available fields in the new HRIS
- Map employee profile fields
- Map organizational structure data
- Map employment and compensation fields
- Map custom fields used by your organization

4. Standardize Data Formats

- Standardize date formats
- Harmonize department names and job titles
- Confirm consistent employee identifiers (ID or email)
- Organize documents and file naming conventions
- Prepare final files for import

5. Validate Data Before Import

- Confirm required fields are completed
- Review a sample of employee profiles
- Validate totals such as employee counts or balances
- Confirm document attachments are linked correctly
- Validate formatting and field compatibility

6. Verify System Configuration

- Configure user roles and permissions
- Validate HR admin access
- Confirm manager permissions
- Verify employee self-service settings
- Test approval workflows and HR processes

7. Prepare Internal Communication

- Announce the new HRIS internally
- Share launch timeline
- Provide login instructions
- Prepare help resources or FAQs
- Identify internal support contacts

8. Go Live

- Final data migration completed
- HR team access verified
- Manager access confirmed
- Employee accounts activated
- Initial system checks completed

9. Post-Migration Review

- Verify employee record accuracy
- Validate reporting and analytics
- Confirm HR workflows function properly
- Collect feedback from HR and managers
- Identify improvements or optimizations

What makes HRIS migration easier than you think

Modern HR platforms simplify migration thanks to:

- ✓ standardized import templates
- ✓ structured onboarding processes
- ✓ dedicated implementation specialists
- ✓ guided data migration workflows



With the right preparation and support, HRIS migration is often much simpler than organizations expect!



Ready to simplify your HR system?

A structured migration process makes it easier to switch systems, improve data quality, and build a stronger HR foundation.

Book a demo to see how your HRIS migration could work in practice with Folks!

[Book a demo!](#)

