



# Applicant Tracking System Migration and Implementation Toolkit

Your practical guide to switching Applicant  
Tracking Systems with confidence

Changing your Applicant Tracking System (ATS) can feel like a complex project. However, with the right preparation and a structured approach, most ATS migrations are straightforward and quick to complete.

This toolkit helps you:

- evaluate your readiness for an ATS migration
- understand the key steps of the process
- visualize the typical migration timeline
- track progress with a practical checklist

Feel free to use it as a planning tool to guide your team through the transition.



# ATS Migration Readiness Assessment

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

## Recruitment Data

- Our candidate data is stored in a centralized ATS or structured system
- We know where all recruitment data currently lives (ATS, spreadsheets, emails)
- Our candidate records are generally organized and accessible
- We know which historical candidate data we want to migrate

## Recruitment Processes

- We have clearly defined hiring stages and pipelines
- We understand how our recruitment workflows should look in the new ATS
- We have identified who will lead the migration internally

## Organization

- Key stakeholders are identified (recruitment, HR, hiring managers)
- We understand how the migration will impact recruiters and hiring teams
- We are prepared to communicate the change internally

## Your Score

Count the number of boxes checked.

### 0-3 → Early exploration

Your organization is still evaluating ATS migration.

### 4-7 → Preparing for migration

You are starting to structure your transition.

### 8-10 → Ready to migrate

You are well positioned to begin the migration process.

# The ATS Migration in 4 Simple Steps

Most ATS migrations follow four key phases:

**1**

## Review recruitment data

Assess candidate databases, job postings, and historical hiring data.

**2**

## Define pipeline structure

Align recruitment stages, workflows, and job templates.

**3**

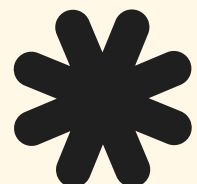
## Configure the ATS

Set user roles, hiring workflows, and integrations.

**4**

## Launch and train users

Activate the system and train recruiters and hiring managers on how to effectively use the platform.



# Typical ATS Migration Timeline

Most ATS migrations follow a relatively short and structured timeline.

Phase	Typical Duration
Recruitment data review	1-2 weeks
Pipeline configuration	1-2 weeks
System configuration	1-2 weeks
Go-live preparation	1 week

**Typical total migration timeline: 4-7 weeks**



Actual timelines depend on the complexity of your recruitment workflows and historical data. 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.

# ATS Migration Checklist

Use this checklist to track the migration progress.

## 1. Define Migration Scope

- Identify all current recruitment data sources (*ATS, spreadsheets, job boards, email archives*)
- Decide which candidate data should be migrated
- Determine which historical candidates should be archived
- Identify job postings and hiring pipelines that need to be recreated
- Confirm key recruitment data required for daily operations

**Notes:**

**Migration Owner:**

## 2. Review and Clean Candidate Data

- Remove duplicate candidate profiles
- Archive outdated candidate records
- Verify contact information and candidate profiles
- Standardize candidate tags and labels
- Clean recruitment pipelines and job posting lists

## 3. Prepare Data Mapping

- Export candidate data from the current ATS
- Map candidate fields (*name, email, application date, status*)
- Map job postings and pipeline stages
- Map recruiter assignments and hiring managers
- Map notes, attachments, and candidate history if applicable

## 4. Standardize Recruitment Data

- Standardize pipeline stage names
- Harmonize job title naming conventions
- Confirm candidate identifiers (email or profile ID)
- Organize documents such as resumes and attachments
- Prepare final import files

## 5. Configure ATS Settings

- Configure user roles and permissions
- Set recruiter access
- Configure hiring manager access
- Define recruitment pipelines and workflows
- Configure integrations (job boards, HRIS if applicable)

## 6. Prepare Internal Communication

- Inform recruiters and hiring managers about the new ATS
- Share launch timeline
- Provide login instructions
- Prepare training resources or documentation
- Identify internal support contacts

## 7. Go Live

- Final candidate data migration completed
- Recruiter access verified
- Hiring manager access confirmed
- Active job postings validated
- Initial system check completed

## 8. Post-Migration Review

- Verify candidate records accuracy
- Confirm hiring pipelines function correctly
- Validate reporting and recruitment analytics
- Collect feedback from recruiters and hiring managers
- Identify improvements or workflow adjustments

## What makes ATS migration easier than you might think

Modern ATS platforms simplify migration thanks to:

- ✓ standardized pipeline configurations
- ✓ guided onboarding processes
- ✓ integrations with HR systems
- ✓ test environments before launch

With the right preparation, ATS migration is often faster and easier than recruitment teams expect.

## Ready to modernize your recruitment process?

A structured ATS migration helps you organize candidate data, improve hiring workflows, and give recruiters the tools they need to hire faster.

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

[Book a demo!](#)