

Your Guide To Community Migration Services

[Whitepaper]



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A Brief Summary

This whitepaper is a complete run-down on Community Migration.

Migrating online communities is a complex task. A lot is at stake for community practitioners when they decide to move from a platform that they have so heavily invested in.

Therefore, to help them out, we have distilled out information from years of study and expertise with an aim to provide a consolidated guide for community migration. This resourceful document covers the why, when, what and how for the migration process of an online community. So let's get into it.

Community Migration for Businesses

On the surface, the process itself needs no introduction or definition, as it simply means moving from one online platform to another.

Though, the whole process is complex and needs a comprehensive plan of action. We'll discuss this thoroughly in the following sections.

First, let's cover:



How does the need to migrate communities arise?

If your business has, in any capacity, employed an online community you may be well-familiar with its benefits, especially if you use them for their core-engagement programs. These communities can be used in various facets for businesses, either for your customers, agents, or employees.

However, no matter who your end-users are in the community, the mission-critical aspect here is to provide them with superior user experience.

This is highly dependent on the kind of platforms that you use for your community practice. Communities should be built on platforms that are growing, robust, and customizable.

With communities, many-a-times practitioners start with using one community platform. But in the course, they either find platforms that are either cheaper or more seamless to use or provide other benefits that their current one does not. This is when they mostly start thinking about migration.

However, sometimes, companies do not rock their boats unless and until they are really left with no other option. There can be multiple factors for that.

When does community migration become imperative?

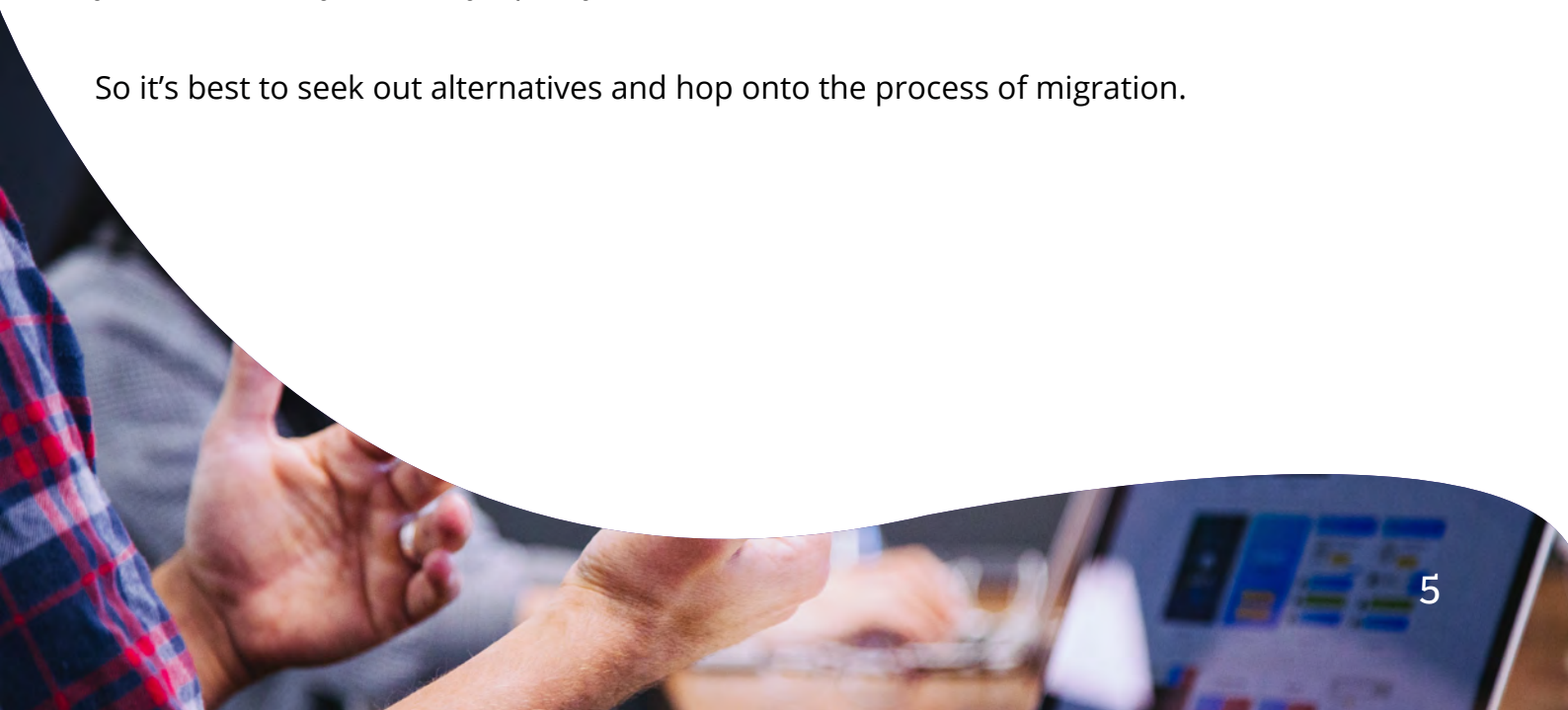
Companies invest too much on any platform that they use. Therefore, it's not hard to imagine when they sometimes protest the change.

However, there are certain times that they face challenges that only a migration can overcome. Some such challenges are:

- The platform **nears the end of life**
- The platform is **missing out on trendier functionalities** provided by younger platforms
- The platform is **not easily customizable**
- The platform **cannot be integrated** with your tech-stack
- The platform **misses out basic features** i.e. gamification, knowledge base, search integrations, personalized user experience, etc.
- The platform **has restricted functionality** and does not cater to your growing user base and expanding business
- The platform **has become outdated**

All these factors can really put the experience that you have worked so hard to curate for your community users in jeopardy.

So it's best to seek out alternatives and hop onto the process of migration.



How to proceed with your plan of community migration?

Once you have established the need for community migration, there is no looking back. You have to quickly get on track with the plan as it is a lengthy and complex process. It has to be done in the most impeccable way. Any shoddiness will throw off the user experience completely and may also result in data loss. So it's better to be very cautious with the planning and strategizing of the migration process.

How to start with the process?






Before you jump on to anything, answer the following questions. These will help you be clearer of what you require by switching your community platform.

- **What are the top 3-5 business objectives associated with your community?**
- **Which teams are going to be affected by community migration?**
- **Who are the unique audiences for this community?**
- **What changes are you looking for in your community?**
- **How much budget do you want to allocate on migration?**
- **Which platform goes well with your tech stack?**
- **Are there any restrictions associated with the audiences (e.g. special permissions, restricted access areas, etc.)?**

Once you have all the answers in place, your stance on migration will become more unclouded.

What is the roadmap to a successful community migration process?

The first phase of migration planning should consist of analyzing the following for your community requirements.

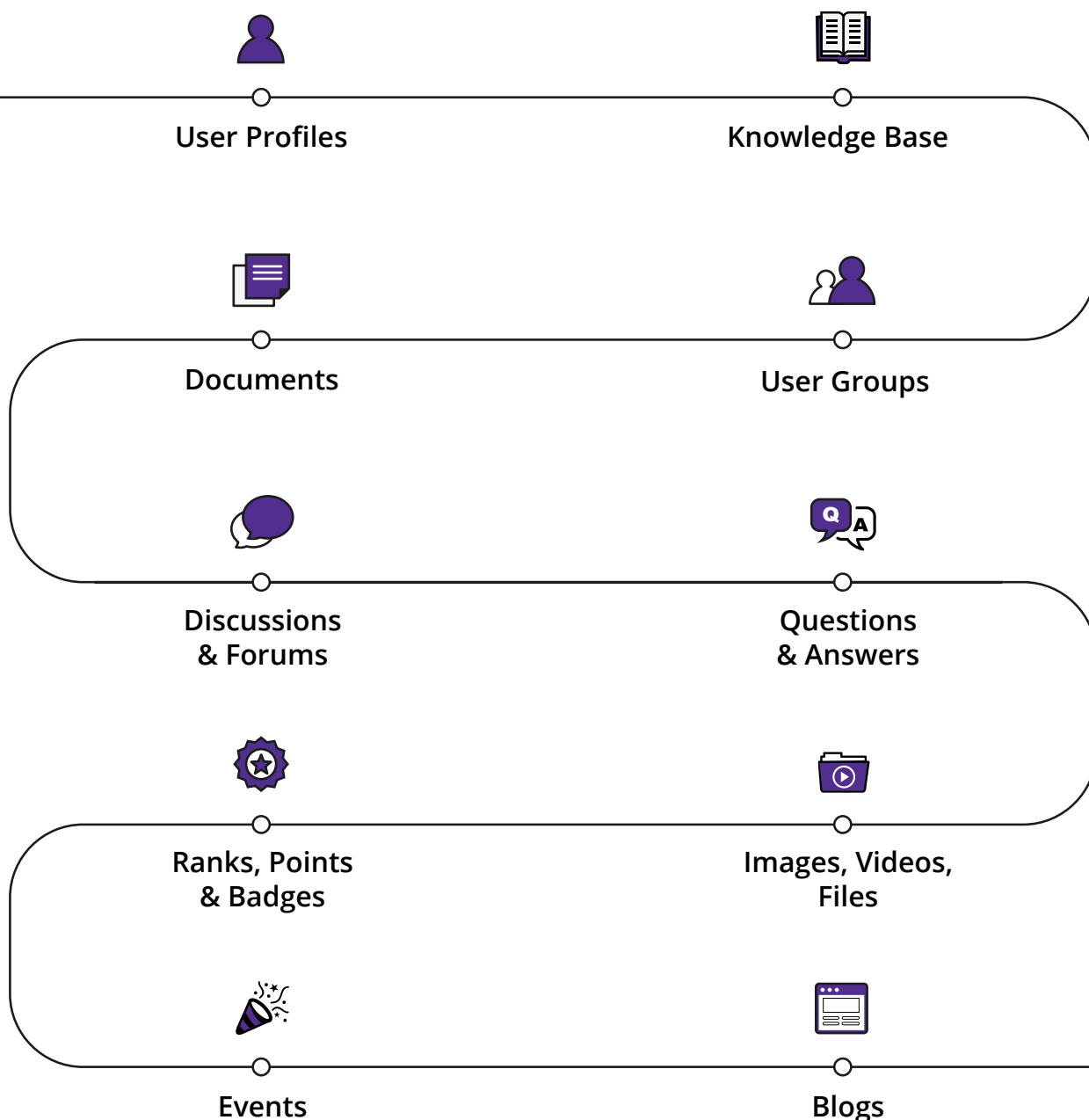
-  **1. Plot Your Timeline** - You must be mindful of when your community license is set for renewal. Most platform vendors require 60 to a 365-days prior notice of non-renewal.
-  **2. Make it Easy for Existing users** - Your users are accustomed to the user experience, architecture, features, and functionality of the legacy community. You should create minimal disruption for your members while enhancing the experience. A focus on change management and member adoption is critical.
-  **3. Communicate Gaps** - Invest in mapping your existing use cases and features to the new environment, documenting any gaps. It's common to retire some features in favor of new ones. Actively communicate these changes to your members and internal stakeholders.
-  **4. Access your Tech Stack** - Before making any decision, we recommend you to check your technology portfolio so you can make the right choice and your community instance can integrate well with SSO, LMS, Marketing Automation, CRM, ERP tool, Account Management, etc.
-  **5. Deliver for the Business** Select a new community platform that can grow with your business by aligning your strategic goals with the vendor's product roadmap.

Some of the most in-demand platforms that you can choose from as per the suitability with your business objectives



What needs to be migrated during the process?

What is to be migrated depends hugely on your current instance and all the ingredients that your community is built on. Here are some basic components that are migrated while moving to a new platform:



What should be the sequence of migration?

A lot of companies skip the proper sequence for migration. However, we highly recommend following a sequential pattern while moving your legacy community content.

In order to facilitate a successful migration, plan the course as per the following succession:



User Profiles and Identity Rules:

By provisioning the user profiles first, associated original content and data can be easily mapped from the legacy community to the new location.



Structure and Metadata:

Community structure and metadata define the location and organization of content. Provisioning this second creates the right spaces for seamless movement of relevant content and files to the new location.



Data, Content, and Files:

With your user-profiles and structure provisioned in the new community, it's time to move the bulk of the data, content, and files from your legacy platform to its new location.

This order makes it easier for you to associate a user's content from the legacy community with his/her new profile while maintaining platform structure integrity.

In short, everything you preserved lands in its appointed place and your new community is ready to start activating your audience.

Overview of Our Community Platform Migration Process

We divide the whole process into 5 phases and move along while strictly adhering to them. Here is the elaborate strategy that we follow.



Conclusion

Community migration can be an uphill task, especially if you have integrated it well with your tech stack or have customized it to fit your needs. But many times, to maintain that 1:1 experience for your users, you are obliged to make the move. Like it happened with a lot of Jive-users, who had to migrate to other platforms after Jive sunsetted the support for communities.

No matter what the reason for community migration, if done immaculately, it can render great results. At the end, you will be able to deliver a better experience to your end-users and that is all that matters here. So be very thorough with your planning for migration and make sure that you carry out every step diligently.

About Grazitti

Grazitti Interactive is a digital innovation leader, powering businesses of all sizes with extensive experience in enriching customer interactions, designing engaging communities, web development, enabling digital marketing, and driving data-driven decision support. Grazitti offers custom services and solutions for web design and development, marketing automation, online community development, Salesforce customization, and analytics. We are proud to have served digital innovation needs of over 1000 global customers including many Fortune 500 across Technology, Banking and Financial Services, Healthcare, Travel, and more.



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