LEGALSONE FIELD GUIDE

Law Firm Software Migration Checklist

Plan, test, validate, and launch a controlled move from legacy case-management software, spreadsheets, or a fragmented tool stack.

USE THIS WITH	OWNER	REVIEW DATE
Firm leadership and operations	____________________	____________________

1. Scope and ownership

Define the project before requesting an export.

[ ] Name an executive sponsor and day-to-day project owner.

[ ] List the systems and data types in scope.

[ ] Classify records as migrate, archive, or discard.

[ ] Set cutover, validation, training, and go-live dates.

[ ] Document who can approve scope and mapping decisions.

2. Source-data cleanup

Fix the records that drive workflows and reporting.

[ ] Merge duplicate contacts and companies.

[ ] Close or archive stale matters.

[ ] Standardize practice areas, statuses, staff names, and matter types.

[ ] Identify missing responsible attorneys, dates, and client identifiers.

[ ] Inventory document locations and unsupported file types.

3. Mapping and permissions

Agree where information belongs and who can see it.

[ ] Map every source field to a destination field.

[ ] Document transformations and default values.

[ ] Map users, roles, groups, and restricted matters.

[ ] Confirm billing, trust, and custom-field treatment.

[ ] Approve the mapping before the test import.

4. Test import and validation

Use a representative sample before final cutover.

[ ] Test open, closed, simple, and complex matters.

[ ] Reconcile record and document counts.

[ ] Sample relationships, notes, dates, balances, and permissions.

[ ] Log every exception, owner, and resolution.

[ ] Obtain written signoff on test results.

5. Cutover and launch

Protect continuity while the team changes systems.

[ ] Freeze or tightly control source-system changes.

[ ] Complete the final export and import.

[ ] Run the approved validation checklist.

[ ] Train by role using real firm workflows.

[ ] Keep the legacy system read-only during the validation window.

30-Day Adoption Review

Use this after launch to turn questions into lasting improvements.

Adoption and quality

Review actual use rather than attendance at training.

[ ] Measure active users and workflow completion.

[ ] Review workarounds, duplicate entry, and missing reports.

[ ] Prioritize configuration changes by business impact.

[ ] Update SOPs and training with every approved change.

[ ] Close the legacy system only after retention obligations are satisfied.

This operational resource is for planning and discussion. Adapt it to your firm's professional, legal, and contractual obligations.