

MOVING YOUR ONLINE COMMUNITY?

Your essential checklist when planning your migration to Breezio or any other community engagement platform.

1

What can be moved?

Take stock of the types of data your current vendor lets you export and if there are automated ways to move data



Users & Groups



Files



Posts

2

What is accepted?

Take inventory of what your new vendor lets you import. Breezio lets you import users, groups, files, posts, libraries manually and with proprietary tools.

3

Stay ahead of the game

Ask current vendor for a test export & do a limited import early to make sure formats are compatible. Then close to launching do a final export

4

Clean house

Use this opportunity to sunset inactive groups and clean your data. Move only necessary information.



5

Communicate switch

Communicate switch to members via all marketing channels. Build excitement around making the switch and convey key benefits

6

Online user training

Train users on how they can do what was done in the previous system, and highlight what new benefits come with the new system. Keep it brief and highlight key points to not overwhelm users.

7

Create help materials

Create documentation and reference materials on how to use the new system. Like training, keep it brief and highlight key points to not overwhelm users

8

Designate experts

Designate teammates or active members as "experts" who can help others



Ready to make the move?

Breezio.com is a leader with a decade of experience migrating clients from a variety of systems making sure the process is seamless for your staff and members

Book a demo

Talk to us

www.breezio.com

