



# MIGRATION PLAYBOOK TEMPLATE

A Step-by-Step Framework for Safe Technology Migrations

For Architects and Engineering Managers

## WHAT'S INSIDE

---

- > Migration assessment and risk analysis
- > Strategy selection framework (4 patterns)
- > Phase planning with weekly milestones
- > Risk mitigation and rollback planning
- > Success metrics and retrospective template

**TechDebt.win**

<https://techdebt.win/>

Copyright 2026 TechDebt.win - All Rights Reserved

# 1 Assess Before You Migrate

## Current State Analysis

- \* System/component being migrated: \_\_\_\_\_
- \* Current technology/version: \_\_\_\_\_
- \* Target technology/version: \_\_\_\_\_
- \* Number of dependent systems: \_\_\_\_\_
- \* Lines of code affected (estimate): \_\_\_\_\_
- \* Number of teams impacted: \_\_\_\_\_

## Risk Assessment

- \* Data loss risk:  Low  Medium  High
- \* Downtime risk:  Low  Medium  High
- \* Rollback complexity:  Simple  Moderate  Complex
- \* Team skill gap:  None  Minor  Significant

## 2

# Choose Your Strategy

### Strategy 1: Big Bang Migration

**When:** Small systems, low risk, clear rollback

**Duration:** Days to weeks

**Risk:** High (all-or-nothing)

### Strategy 2: Strangler Fig Pattern

**When:** Large monoliths, gradual replacement needed

**Duration:** Months to years

**Risk:** Low (incremental, reversible)

### Strategy 3: Parallel Run

**When:** Critical systems, data integrity essential

**Duration:** Weeks to months

**Risk:** Medium (duplicate infrastructure cost)

### Strategy 4: Branch by Abstraction

**When:** Internal components, clean interfaces possible

**Duration:** Weeks to months

**Risk:** Low-Medium (abstraction layer complexity)

**Selected strategy:** \_\_\_\_\_ (document rationale in ADR)

## Plan Your Phases

### Phase 1: Preparation (Weeks 1-2)

- \* Create Architecture Decision Record (ADR)
- \* Set up monitoring and rollback procedures
- \* Build feature flags for traffic routing
- \* Establish success metrics and thresholds

### Phase 2: Proof of Concept (Weeks 3-4)

- \* Migrate one low-risk component end-to-end
- \* Validate data integrity and performance
- \* Document lessons learned and adjust plan

### Phase 3: Incremental Migration (Weeks 5-12)

- \* Migrate components in priority order
- \* Run parallel systems with comparison checks
- \* Weekly go/no-go reviews with stakeholders

### Phase 4: Cutover & Cleanup (Weeks 13-16)

- \* Route 100% traffic to new system
- \* Remove old system after soak period
- \* Update documentation and runbooks
- \* Conduct retrospective

## 4 Mitigate Risks

### Rollback Plan

- \* Rollback trigger criteria: \_\_\_\_\_
- \* Rollback procedure: \_\_\_\_\_
- \* Maximum acceptable rollback time: \_\_\_\_\_
- \* Data reconciliation process: \_\_\_\_\_

### Communication Plan

- \* Stakeholder update frequency: \_\_\_\_\_
- \* Escalation path: \_\_\_\_\_
- \* Customer impact notification: \_\_\_\_\_

## 5 Define Success

Metric	Before	Target	After
Latency (p99)	_____	_____	_____
Error rate	_____	_____	_____
Throughput	_____	_____	_____
Deployment frequency	_____	_____	_____
Developer productivity	_____	_____	_____
Operational cost	_____	_____	_____

## 6 Learn and Share

**What went well?**

---

---

---

---

---

**What could have gone better?**

---

---

---

---

---

**What would we do differently?**

---

---

---

---

---

**Recommendations for next migration:**

---

---

---

---

---

Full migration resources at <https://techdebt.win/techniques/>