



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

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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

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)

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

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	_____	_____	_____



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.best/techniques/>