



# Community Software Migration Guide

A project framework for planning, validating, and executing a migration

# Community migrations are rarely a welcome project.

They're disruptive, resource-heavy, and put years of investment under pressure. Between complex integrations, massive datasets, and an active member base that expects continuity, the prospect of moving everything can feel overwhelming.

Complexity, however, doesn't have to mean chaos. Having guided hundreds of migrations, we've seen what makes the difference: **careful planning, the right sequencing, and practices that keep both data and the member experience intact.** Those lessons have shaped a framework that community teams can use to bring structure to the process.

This guide walks through that framework. It's designed to give you a clear understanding of the stages of a migration and the priorities to focus on in each.

## WE'LL COVER:

- **Stages of a typical community migration**
- **Challenges to prepare for**
- **Steps to take by stage**

# Stages of a Community Migration

Every migration follows a series of predictable stages. Here, we'll provide a high-level roadmap explaining what happens in each stage.

## STAGE 1: PRE-PLATFORM SELECTION

In the first stage, shape your migration plan by realigning community goals with organizational priorities. This ensures the migration direction reflects current company goals, rather than outdated KPIs, before you choose a new platform. You may also want to audit your community to get a clear sense of the scope and structure of the migration ahead.

At this stage, if you're definitely planning to migrate, early communication with members helps build trust and goodwill. Sharing a clear, member-focused vision for the future frames the change as progress rather than disruption.

### Key actions:

#### Align

1. Meet with internal stakeholders to understand their organizational priorities and how the community aligns.
2. Update community goals and metrics to ensure those priorities translate into measurable community outcomes.
3. Gather pre-migration benchmarks so you can track performance after launch.

#### Audit

4. Audit your community, including community structure, user roles, gamification, integrations, and custom widgets.
5. Archive outdated or irrelevant content.\*

#### Communicate

6. Share transparent, member-focused reasons for the migration with the community.

*\*We recommend doing this well in advance of migration or waiting until after you've migrated to do it.*

## STAGE 2: PLATFORM SELECTION

Once your migration goals are clear, the next step is selecting the right platform. This stage is about turning your requirements into evaluation criteria, comparing vendors, and ensuring the platform you choose can support both current needs and long-term community growth. A structured selection process avoids shiny-object decisions and builds confidence across stakeholders that the choice is sound.

### Key actions:

#### Define

1. Translate updated community goals into clear platform requirements (e.g. data migration capabilities, integrations, analytics, moderation tools).
2. Prioritize requirements by must-haves, nice-to-haves, and future needs.

#### Evaluate

3. Use a structured RFP process to compare platforms against your requirements.
4. Schedule demos and reference calls to validate technical fit and vendor credibility.

#### Align

5. Involve cross-functional stakeholders (support, marketing, product, IT) in the evaluation to ensure broad alignment.
6. Document how the chosen platform meets business priorities and member needs.



### RESOURCE: COMMUNITY PLATFORM RFP TEMPLATE

A structured RFP process helps you compare platforms on equal footing. This template provides 100+ questions spanning migration, integrations, analytics, moderation, and member experience. Use it to evaluate vendors consistently and document how each aligns with your requirements.

→ [Download the RFP Template](#)

### STAGE 3: EARLY-STAGE MIGRATION

Once you've chosen a new platform, the focus shifts to preparing members and staff. Create FAQs, visual guides, and teaser campaigns for your members. Internally, establish champions across departments, share training and tools, and ensure moderators and staff are confident in new workflows.

On the technical side, you'll work with your current community vendor to determine their specific data export policies, and initiate the first transfers to your new platform.

#### Key actions:

##### Transfer

1. Confirm data export policies with your current vendor.
2. Begin transferring data to the new platform, including a full database export.

##### Promote

3. Create materials (e.g. FAQs, visual guides, teaser campaigns) to educate members and create excitement about the new platform.
4. Provide internal teams with resources (e.g. migration FAQs, talking points, and support scripts) so they can help customers with the transition.
5. Align with marketing, product, and support teams on messaging and workflows.
6. Celebrate internal wins and contributions in your company channels.
7. Create a training plan for moderators on new moderation tools.

## STAGE 4: MID-STAGE MIGRATION

Mid-migration involves finding and fixing technical risks before launch. A trial migration, often with a smaller member segment, provides a safe environment to identify issues. This early rollout is an opportunity to collect testimonials from your pilot participants, which you can use to build confidence and excitement among the wider community. Stay closely connected with your new community vendor's migration team to answer questions quickly and keep the project moving forward.

### Key actions:

#### Trial

1. Run a trial migration using your first data export with a small group of users who can beta test the new platform.
2. Collect feedback and testimonials from pilot participants.
3. Validate data has been transferred correctly and completely.

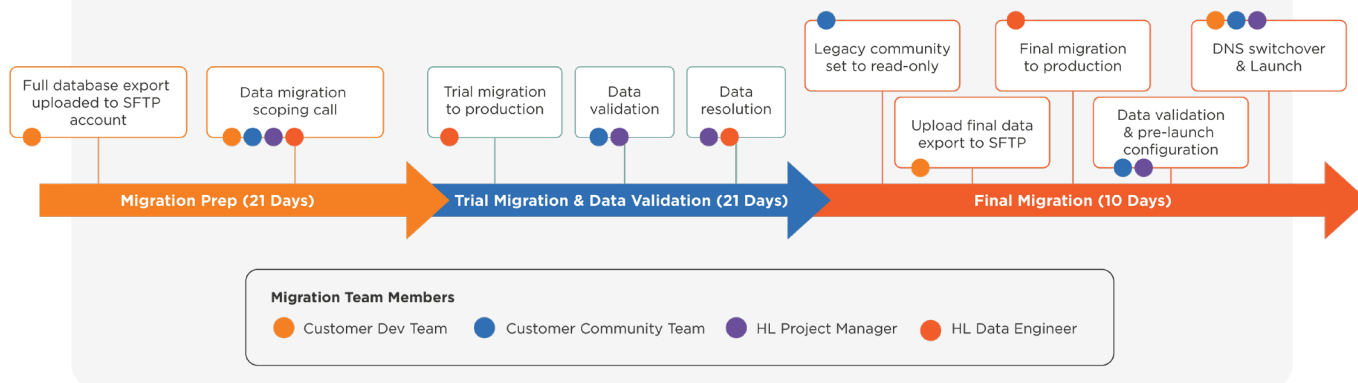
#### Plan

4. Determine needs for data clean-up, redirects, and URL consistency.
5. Identify blockers, especially ones tied to platform capabilities, security, or workflows.
6. Work with stakeholders (internal and vendor) to resolve gaps.



### MIGRATING TO HIGHER LOGIC

When companies migrate their communities to Higher Logic, they can expect to follow a similar process to the chart below. Each customer is assigned a data engineer to manage the migration process and an implementation advisor to implement the software and coordinate a smooth and successful migration.



## STAGE 5: LATE-STAGE MIGRATION

In this stage, everything comes together. Final data transfers take place with both old and new vendors, followed by data validation and pre-launch checks. Unexpected delays are common, so plan buffer time and stay coordinated with your new vendor to maintain momentum.

In the final weeks of migration, clear, member-focused communication about downtime and launch timelines helps build excitement rather than frustration.

Once the production environment is ready, flipping the switch on your domain makes the launch official.

### Key actions:

#### Revise

1. Incorporate feedback from pilot program into final tweaks before the full rollout.

#### Validate

2. Coordinate with vendors to complete the final data export.
3. Validate data accuracy and confirm pre-launch configuration.
4. Upload final data export to new vendor, building in buffer time.

#### Communicate

5. Share a clear migration timeline with progress updates both internally and with community members.



### HEAR FROM KATELYN | CRISIS TEXT LINE'S MIGRATION TO HIGHER LOGIC

10/10 onboarding experience. The implementation process was incredibly hands-on with the Higher Logic team. Our implementation manager went above and beyond in getting us technically set up for success with a tight timeframe. Plus, the strategic advisors were fantastic. They took our vision and strategy and brought it to life."

**Katelyn Gillum, Director of Community, Crisis Text Line**

→ [Read their story](#)

## STAGE 6: POST-LAUNCH

Once you've launched, you'll shift to outcomes and optimization. Measure results to validate your decision to migrate, demonstrate ROI, and secure continued investment. Not everything will perform the same way—you might see some metrics improve and others dip, which is normal. Establish feedback loops within your company and community, encouraging members to point out if something's not working as expected or could be improved. Launch surveys or discussions focused on the new experience. This shows responsiveness and a long-term commitment to member needs.

### Key actions:

#### Measure

1. Measure post-migration outcomes and compare them to your pre-migration benchmarks.

#### Listen

2. Launch a member survey or open feedback thread focused on the new experience.
3. Conduct listening sessions with super users, moderators, and advisory groups.



**Higher Logic's sentiment analysis tool** helps you quickly understand how members feel about the new community. Monitor reactions to keywords tied to your migration and setup, with results available in real time. Use these insights to refine community programming, permissions, onboarding guides, and more.

#### Revise

4. Track common pain points and publish improvements publicly where possible.
5. Reassess programming and engagement based on new behavioral patterns.
6. Sunset low-impact initiatives and double down on emerging member behaviors.

#### Celebrate

7. Highlight wins and positive user feedback internally to reinforce the value of migrating.
8. Report on ROI to validate your decision and secure ongoing investment.



**Quick Reference:** We've just walked through each stage of a community migration in detail. To see the full journey at a glance, you'll find a summary table at the end of this guide. It captures every stage side-by-side so you can reference the whole process in one place.



# Common Migration Challenges

Having migrated hundreds of online communities from many different platforms, we've seen the common pitfalls that bog customers down. Here are some of the most frequent challenges—and how to avoid them with the right preparation.

## 1 Data

Data is the trickiest part of a migration. Here are a few challenges you might face:

- **Data extraction complexities:** Every platform has quirks in how exports work, such as limits on free exports, format differences, retention policies, or permissions that restrict access to certain fields.
- **How to prepare:** Ask about export policies and timing as early as possible, and share this information with your new vendor to prevent surprises or data loss.



### HEAR FROM NICHOLE | SECUREAUTH'S MIGRATION TO HIGHER LOGIC

There were so many places that our information could be found. We had various forums, blog posts, knowledge bases, and repositories, so we were concerned about getting all of this content into the new Vanilla community without losing anything. **As it turned out, we had nothing to worry about at all!**

Nichole Devolites, Director of Customer Experience, SecureAuth

→ [Read their story](#)

- **Data structure differences:** Exports don't always map cleanly. For example, gamification data may be bundled in unexpected ways or buried across multiple files.
- **How to prepare:** Work with your future vendor on how they'll map and validate data to ensure accuracy.



**Field mapping** is the process of aligning data fields between systems to make sure information transfers accurately and consistently. While its primary role is to preserve data integrity, it also tends to surface mismatches or gaps in the structure, which can be addressed before launch. At Higher Logic, we've made field mapping a core part of our migration process to catch these differences early and keep the final migration smooth.

- **Data cleanup:** Migration often doubles as a cleanup effort, but this can create scope creep, last-minute changes, or confusion over what will (or won't) be imported.
- **How to prepare:** Before any trial migrations, review and clean up categories and discussions in your legacy community to remove duplicates, archive outdated content, and ensure naming consistency. This helps keep the migrated data organized, reduces clutter, and improves the accuracy of migration mapping. If cleanup cannot be completed beforehand, develop a clear plan for restructuring after the final migration but before launch.



Higher Logic makes **category cleanup after migration** simple. Admins can easily create, edit, and reorder categories with drag-and-drop tools, assign types for clear purpose, and apply layouts without coding. Because changes update instantly, it's quick to organize migrated content and give members a clean, intuitive structure.

- **Data validation:** Data doesn't always transfer cleanly on the first attempt. Many migrations require trial runs to uncover mismatches, like archived posts being excluded from exports or custom profile fields failing to map correctly. These validation cycles are often necessary but can be time-consuming, and teams frequently underestimate the impact on timelines.
- **How to prepare:** Plan for at least some iteration. Build in buffer time, set expectations early, and leave space to collect and address feedback after each pass so delays don't pile up.



**Worried about a migration's impact on web traffic?** Higher Logic minimizes the risk of traffic loss during a migration by using a robust redirect strategy. Redirects ensure that old community URLs—whether linked from search engines, bookmarks, or other sites—seamlessly forward to their new equivalents in Higher Logic. This prevents broken links, preserves SEO value, and provides a smooth experience for end users.

## ② Lack of Feature Parity

No new platform will match your old one feature-for-feature. Some losses are inevitable, which can create resistance among staff or members.

**How to prepare:** Engage stakeholders in User Acceptance Testing (UAT) to surface gaps or friction points early, so you can fix what's fixable and message proactively around what isn't.



Higher Logic can create workarounds to minimize the impact of lost features via our **custom pages and widgets**. Think of custom pages like blank canvases, where you can build unique pages for things like welcome messages, event hubs, or special campaigns. Widgets are like building blocks (discussion lists, banners, buttons) that you can drag, drop, and rearrange to design the page however you want. And if something more advanced is needed, Higher Logic's widget builder lets you create new blocks or tweak existing ones. Together, these tools make it easy to "fill the gaps" and recreate or even improve on features that may have been lost in the migration.

## ③ Limited Internal Staffing or Resourcing

Migrations take time from both the community and technical teams. If resourcing is tight for your tech team, critical elements like SSO or integrations may cause delays.

**How to prepare:** Delays may be unavoidable, but involving tech teams early raises awareness and helps minimize impact.



Higher Logic's engineers provide robust documentation and can join calls to make the process as easy as possible.

## ④ Change Management

Migrating to a new platform inherently changes the member experience, and these changes can cause frustration. For example, members might have trouble logging in or with new functionality.

**How to prepare:** Communicate early and often—via FAQs, guides, visual teasers, or listening sessions—to reduce confusion and create goodwill. Provide clear support pathways for members.



### HEAR FROM BRAD | ACER'S MIGRATION TO HIGHER LOGIC

It was one of the smoother software migrations I have been a part of. It's very much a testimony to the [team at Higher Logic] that we had very minimal impact on the customer base, the user base, and the superfans."

**Brad Bliven, Senior Program Manager, Acer**

→ [Read their story](#)

## Ready, Set, Migrate

Changing platforms is one of the few moments where every part of your community comes under review. It's a forced reset; the kind you don't often get once a community is up and running.

While the work is demanding, it creates the chance to clear away what no longer serves members, sharpen alignment with organizational goals, and reintroduce the community internally with a stronger story. When handled thoughtfully, the migration process builds momentum and trust, setting the stage for a program that's more resilient and strategically valuable than before.

## Why Choose Higher Logic?

With experience migrating communities for Fortune 500 companies to nonprofit organizations, we bring unmatched expertise. Our team has migrated a wide range of platforms, including:

- Khoros/Lithium
- Gainsight/Insided
- Salesforce
- GetSatisfaction
- Jive
- phpBB
- bbPress
- vBulletin
- Invision Power (IPB)
- Simple Press
- Simple Machines (SMF)

If you're considering a move, we can help you navigate the process with confidence and clarity, whether you want to understand what's possible, dig into the technical details, or just explore what a migration could look like for your community.

**Learn more about Higher Logic's migration process or reach out to start the conversation.**

**GET IN TOUCH**

# What to Expect from a Community Migration

STAGES	Pre-Platform Selection	Platform Selection	Early-Stage Migration	Mid-Stage Migration	Late-Stage Migration	Post Launch
<b>Description</b>	Align community strategy with current organizational goals and audit what to carry forward.	Select a platform that aligns with your goals by defining requirements, evaluating vendors, and aligning stakeholders.	Build readiness by educating members, training teams, and beginning data export.	Pilot the migration, resolve risks, and validate data to build confidence.	Complete final transfers, configure for launch, and communicate a clear, member-focused vision.	Measure outcomes, refine programming, and gather feedback to drive continuous improvement
<b>Blockers</b>	Community cleanup	Misaligned priorities across stakeholders	Data extraction complexities	Data validation Lack of feature parity	Limited internal staffing or resourcing	Change management
<b>Key Actions/ Tasks</b>	<p>Meet with internal stakeholders to understand their organizational priorities and how the community aligns.</p> <p>Update community goals and metrics to ensure organizational priorities are translated into measurable community outcomes.</p> <p>Gather pre-migration benchmarks so you can track performance after launch.</p>	<p>Translate updated community goals into clear platform requirements.</p> <p>Prioritize requirements by must-haves, nice-to-haves, and future needs.</p> <p>Use a structured RFP process to compare platforms against your requirements.</p> <p>Schedule demos and reference calls to validate technical fit and vendor credibility.</p>	<p>Confirm data export policies with your current vendor.</p> <p>Begin transferring data to the new platform, including a full database export.</p> <p>Create materials (e.g. FAQs, visual guides, teaser campaigns) to educate members and create excitement about the new platform.</p>	<p>Run a trial migration using your first data export with a small group of users who can beta test the new platform.</p> <p>Collect feedback and testimonials from pilot participants.</p> <p>Validate data has been transferred correctly and completely.</p> <p>Determine needs for data clean-up, redirects, and URL consistency.</p>	<p>Incorporate feedback from pilot program into final tweaks before the full rollout.</p> <p>Train super users and moderators on the new system.</p> <p>Coordinate with vendors to complete the final data export.</p> <p>Validate data accuracy and confirm pre-launch configuration.</p>	<p>Measure post-migration outcomes and compare them to your pre-migration benchmarks.</p> <p>Launch a member survey or open feedback thread focused on the new experience.</p> <p>Conduct listening sessions with super users, moderators, and advisory groups.</p> <p>Track common pain points and publish improvements publicly where possible.</p>

**Key Actions/Tasks continued on next page**

<b>Key Actions/ Tasks</b>	<p>Audit your community, including community structure, user roles, gamification, and custom widgets.</p> <p>Archive outdated or irrelevant content.</p> <p>Share a transparent, member-focused vision for the future migration.</p>	<p>Involve cross-functional stakeholders in the evaluation to ensure broad alignment.</p> <p>Document how the chosen platform meets business priorities and member needs.</p>	<p>Provide internal teams with resources like migration FAQs, talking points, and support scripts so they can help customers with the transition.</p> <p>Align with marketing, product, and support teams on messaging and workflows.</p> <p>Celebrate internal wins and contributions in your company channels.</p>	<p>Identify blockers, especially ones tied to platform capabilities, security, or workflows.</p> <p>Work with stakeholders (internal and vendor) to resolve gaps.</p> <p>Create a training plan for moderators on new moderation tools.</p>	<p>Upload final data export to new vendor, building in buffer time.</p> <p>Share a clear migration timeline with progress updates both internally and with community members.</p>	<p>Reassess programming and engagement based on new behavioral patterns.</p> <p>Sunset low-impact initiatives and double down on emerging member behaviors.</p> <p>Highlight wins and positive user feedback internally to reinforce the value of migrating.</p> <p>Report on ROI to validate your decision and secure ongoing investment.</p>