

# Excel to Calibration Software Migration Playbook

Small-lab checklist for data cleanup, import mapping, rollout, and ROI tracking

## Migration Triggers

- Repeated overdue instruments or late reminders.
- Duplicate asset records across multiple spreadsheets.
- Difficult certificate retrieval during audits.
- Formula/version errors affecting due-date logic.

## Data Cleanup and Mapping

- Normalize instrument IDs and remove duplicates.
- Standardize date formats, units, and status values.
- Map each spreadsheet column to destination system field.
- Flag missing certificate references before import.

## Pilot Rollout

- Import a pilot group (10-20 percent of assets).
- Validate due-date logic and event timeline order.
- Train pilot users by role and collect workflow feedback.
- Document required template/process adjustments.

## Full Migration Controls

- Define sheet-edit freeze windows per migration batch.
- Assign batch owner and verification reviewer.
- Confirm each migrated asset has complete history links.
- Switch reminders and reports to software as system of record.

## ROI and Audit Readiness Check

- Track admin hours saved per week after go-live.
- Track overdue critical instruments before vs after migration.
- Measure audit evidence retrieval time reduction.
- Review migration outcomes after first full audit cycle.