

PLATFORM MIGRATION FINANCIAL PLANNING TEMPLATE

Project Name:

Target Completion Date:

Project Lead:

Current Platform:

Department / Cost Center:

Target Platform:

1. One-Time Migration Expenses

Discovery & Planning Phase

Pre-migration Assessment & Consultation

Architecture & Security Design

Data & Infrastructure Migration

Data Extraction & Cleaning Tools

Migration Service Providers / Contractors

Temporary Cloud / Hosting Infrastructure

Integration & Custom Development

API / Custom Connector Development

UI/UX Rebranding & Configuration

Testing, Training & Rollout

User Acceptance Testing (UAT)

Staff Training Programs &
Documentation

**Subtotal - One-Time
Expenses**

2. Overlapping & Operational Transition Costs

Dual Licensing Fees (Legacy +
New Platform)

Legacy System Data Archive /
Storage Hosting

Internal Resource Overtime /
Backfill staff

Contingency Buffer (e.g., 15%)

Subtotal - Transition Costs

3. Post-Migration Annualized Run Rate (For Comparison)

Software Licensing /
Subscription Fees

Hosting, Infrastructure &
Servers

Maintenance & Support SLA
Contracts

**Total Post-Migration Run
Rate Change**

Project Notes & Assumptions