

# INVERITA

## How to smoothly migrate your IT projects to a different vendor

Companies face many uncertainties when it comes to project migration. And it's not without reason. Inefficient knowledge transfer leads to the necessity of redeveloping all of the processes, including even those that are almost finished, which is a complete waste of resources. Yet, no matter how challenging it is, there's a safe way of delivering your project to another company.

In this paper, we share effective methodologies regarding different types of knowledge transfer between vendors, clients and a vendor, and engineering teams. These tips have proven themselves to be useful in many companies and can be applied by executives and technology officers when migrating IT projects to a different vendor.

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# Types of knowledge and how their merge can help you easily migrate your IT project

Proper understanding of knowledge management is the first step towards efficient knowledge transfer. It enables teams and organizations to achieve their goals by clearly transmitting all of the data generated in the process of software development (e.g. coding reuse or software project management methods).

It is always easier to represent knowledge that already exists in the documentation, or so-called explicit knowledge. Tacit knowledge, another type of information storage, is the information and mix of experiences that

exist in the minds of software developers, project managers, QAs and other team members, and is difficult to pass through the development cycle.

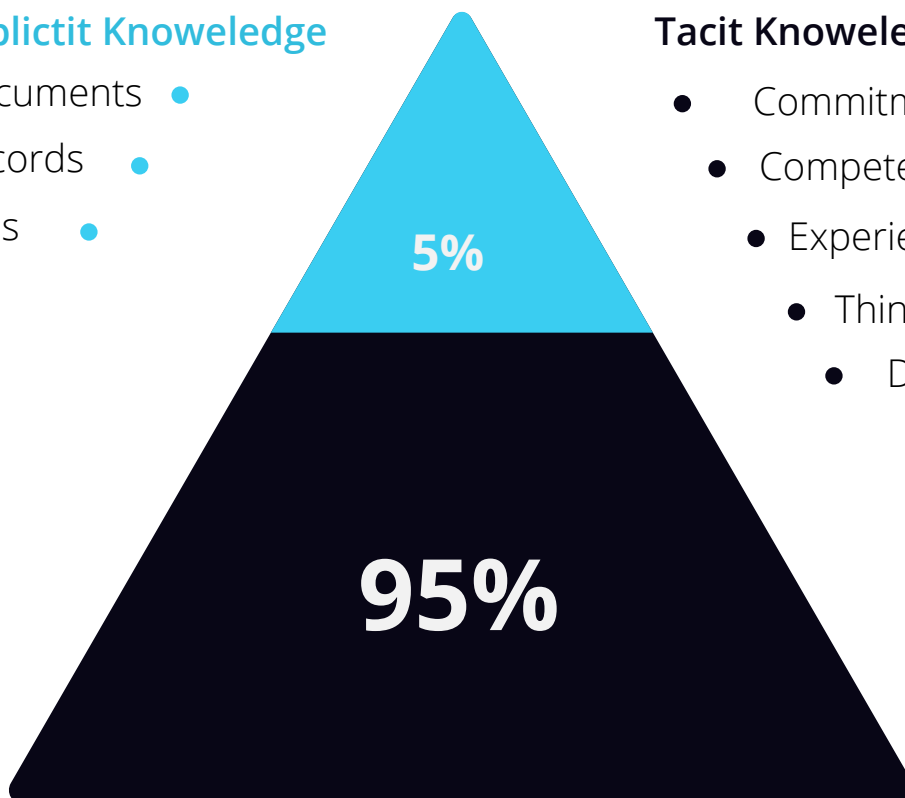
To prevent the incorrect information transmission or knowledge loss the company must collect both explicit and tacit information regarding the project and convert it into a format understandable to a vendor. It must be up to date and correct so that the users couldn't question its relevance. Check up how to develop a knowledge transition plan in the next section.

## Explicit Knowledge

- Documents ●
- Records ●
- Files ●

## Tacit Knowledge

- Commitment
- Competence
- Experience
  - Thinking
  - Deed



# Smoothly migrate your IT project by following this step by step guide

There are two common scenarios of the project migration — either from a client to a vendor or from a vendor to a new vendor. We provide you with a knowledge transition plan that can be used in both cases.

## Step 1. Determine what information to collect

The first step of the transition project process is to gather the information that already exists in an understandable form for another party. Here's an approximate list of components your new vendor might need access to:

### Documentation

- Business requirements
- Project specifications
- Tech stack information
- Software architecture documentation
- Source code documentation
- Quality assurance documentation
- API documentation
- Product roadmaps (strategic roadmap, technology or IT roadmap, release plan)

### Information

- Deployment procedures information
- Server configuration information
- Information about tools/services used and access to them

### UI/UX documentation:

- User experience design documentation (user personas, user scenario, scenario map, user story map, UX style guide)
- Site maps (wireframes, mock-ups, prototypes, user flow schemes or user journey, usability testing reports)

### Access

- Access to cloud, servers, databases
- Repository URLs with access details
- Information or documentation of external APIs used
- APIs docs of internal APIs
- Development credentials (access to your project's repository, CI, task tracking system, etc.)

## Step 2. Document the “non-documented” knowledge

There must be a knowledge exchange on the individual level because there’s a lot going on outside of the process mentioned in the documentation.

For example, there’s a need to share some information on how to use CI/CD for a particular application. If the data hasn’t been previously documented and exists only in the head of a developer it is wise to organize a meeting between developers for the sake of knowledge exchange.

Another way to make this information explicit is to document the whole procedure. For more effective knowledge transfer you can organize a meet-up as well as provide procedure documents as an additional asset.

Ensure smooth and step-by-step knowledge transfer by using the following methods:

- Regular weekly meetings
- Live and on-site training
- One-to-one discussions
- Q&As and tech talks
- Coaching and advising
- Technical documentation



Do you need help with knowledge transfer?

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### Step 3. Define specialists engaged in the project migration process

After you define what type of information you need to provide to your vendor, decide who should convey and receive the knowledge on both sides. Speak with the representatives of legal, engagement and finance departments about source code ownership, data transition and NDA. Contact a CTO or PM regarding technical knowledge (e.g. source code documentation, software architecture, API documentation, etc.) and set up a series of meetings between software developers, UI/UX designers, QAs, BAs, and software architects to deliver information on a personal level.



### Step 4. Measure and evaluate the project transfer



How can you understand if the project migration is successful? Overall, it depends on what goals you wanted to achieve with this project. Reviewing the effectiveness of knowledge transfer is a continuous process. You'll be able to see only a glimpse of results at the beginning, however, the whole picture is going to be revealed at the end. The first thing to pay attention to is how quickly your teams are able to start working on a project (set up a development environment) and figure out what has already been done to avoid duplication of someone's work.

## inVertia experience with project migration

inVerita has been successfully partnering with multiple organisations all over the world which has helped us to craft a rigid project migration strategy. We define the current development state of a project, issues faced with previous vendors and how to deal with them, analyze project migration

risks, create the whole transition plan and prepare required onboarding documents. Besides, inVertia always provides suggestions on the project improvements, such as implementation of additional features and incorporation of advanced technology stack.



### Final thoughts

Successful software project migration depends upon the processes inside of the company of the chosen vendor and the project migration plan you develop. If you've already decided who you want to entrust your product to, start working on the project migration plan. We believe this guide got your wheels turning when it comes to your IT project migration strategy. If you still have questions, reach out to us and we'll provide you with a necessary consultation for free stack.

[Reach out to us](#)

# About inVerita

- Over 110 employees in 4 years
- Company processes are OKR driven
- 87% of the customers have been staying with us throughout the years
- Experience in working with both startups and Fortune 500 clients
- Over 20 active client accounts
- inVerita has a separate product design division — QU'ARTE
- 80% of our customers are based in the US

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