

# Governance Migration Readiness Checklist

## Audit Your Governance Reality

### Policy Coverage

- Have all critical data domains (customer, financial, risk) been mapped to governance policies?
- Are policies actively enforced, not just documented?
- Can each policy be mapped to regulatory frameworks? (e.g., GDPR, BCBS 239, SOC 2)

### Metadata and Lineage

- What percentage of data assets have complete documentation?
- Is lineage available end-to-end from ingestion to reporting?
- Are sensitive data assets (e.g., PII) consistently classified and tagged?

### Ownership Clarity

- Are ownership models defined for each domain or dataset?
- Is a RACI matrix in place for governance roles and responsibilities?
- Are unresolved ownership gaps creating blockers or compliance risk?

### Adoption Patterns

- Are governance processes actually being used by data and business teams?
- Which governance workflows (e.g., access requests, approvals, tagging) are still manual?
- Are governance capabilities integrated into tools people already use? (e.g., Jira, Slack, BI tools)

# Plan in Phases, Not Platforms

## Define a High-Impact Starting Point

- Have you chosen a domain with clear regulatory or business urgency (e.g., risk, customer, product)?
- Are stakeholders aligned on why this domain is the best place to start?

## Define Success Metrics

- Have you defined success metrics? (e.g., 80% lineage coverage, 50% fewer access tickets, time-to-insight)
- Are KPIs tracked across governance, analytics, and engineering functions?

## Stage Rollouts in Layers

- Phase 1: Metadata discovery and documentation
- Phase 2: Policy creation and enforcement
- Phase 3: Extension to additional domains or use cases

## Automate Where Possible

- Have you identified repetitive governance tasks that can be automated?
- Are rule-based tools (e.g., Atlan Playbooks) being used to automate tagging, classification, or lineage?

# Align Stakeholders Early

## Frame the Value

- Has the business case been communicated as more than compliance—emphasizing agility, trust, and innovation?
- Are different teams aware of how governance modernization supports their workflows?

## Secure Cross-Functional Buy-In

- Are Security, Risk, IT, and Data teams included early in planning and scoping?
- Has shared ownership been established across business and technical stakeholders?

## Embed Governance into Workflows

- Is governance functionality embedded directly into business tools and daily workflows?
- Have you eliminated or minimized switching costs for business users & data producers?

## Identify Early Risk Signals

### Before Migration

- Ownership and documentation are inconsistent across data domains
- Data lineage cannot be stitched across systems
- Engineering and analytics teams are resistant to centralized governance

### After Migration (if unprepared)

- Low platform adoption due to workflow misalignment
- Regulatory exposure due to incomplete metadata or policy enforcement
- Budget lost on underused platforms ("shelfware")
- Frustration between governance teams and data consumers

## Ready to Migrate? Confirm You Can:

- Visualize metadata, ownership, and lineage across the entire data estate
- Identify and automate high-effort, high-risk governance tasks
- Create and enforce policy rules through automation
- Track usage, adoption, and business impact through clear metrics
- Bring together producers, consumers, and compliance in a shared, collaborative environment

## Ready to Move from Audit to Action?

Book a demo to see how teams are using Atlan to automate governance prep, align stakeholders, and accelerate migration success.

[Book a demo →](#)

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