



MIGRATION PLAYBOOK · 2026

RFP Software Migration Checklist

The 12-step playbook MICE planners use to switch from Cvent, Stova, or Bizly to a modern RFP stack — without losing 3 months of historical data or a single in-flight contract.

BRAND-DESIGNED BY EASY RFP
V2026.5 · FREE DOWNLOAD · NO EMAIL REQUIRED

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PHASE 1 · PRE-MIGRATION

Audit, archive, and align stakeholders

TL;DR – THE 12-STEP MIGRATION IN PLAIN ENGLISH

Most "RFP migration" projects fail not because the new tool is bad — but because nobody audited the old one first. 80% of the work is in the first 5 steps below: knowing what you're migrating, what you can safely archive, and who needs to sign off. Steps 6-12 are mechanical.

1 Pull a full export from your current tool

Cvent: *Admin* → *Account* → *Data export*. Stova: support ticket (5-day SLA). Bizly: in-app CSV per RFP. Pull *all* 24+ months — auditors and senior planners will ask for at-least-2-years of pricing history.

2 Map your historical RFPs to a 3-bucket triage

- **Active:** open or in-flight → migrate first
- **Reference:** last 24 months, won/lost → migrate after active
- **Archive:** older than 24 months → S3 / Box, not in the new tool

3 Identify your top 50 hotels by spend

These are the ones the new tool **MUST** onboard cleanly. Test the hotel-respond flow with 3-5 of them before flipping the switch.

4 Get sign-off from finance + procurement

Migration touches contract data and PII. Get email approval from finance lead + procurement before exporting anything — this protects you and them.

COMMON MISTAKE

Skipping step 2. Teams try to migrate everything → blow up timeline by 3-4 weeks → revert to old tool out of frustration.

PHASE 2 · MIGRATION

Move data, validate, and run parallel

5 Stand up the new tool in a sandbox first

Never migrate live data into a tool you haven't smoke-tested. Easy RFP gives a 14-day Pro trial — that's your sandbox window.

6 Import "Active" bucket on day 1, validate, then refer/archive

Don't bulk-import. Day 1: active RFPs only. Day 2-7: validate each one with the planner who owns it. Day 8+: reference + archive in batches of 20.

7 Re-invite top hotels to the new respond flow

Brand the invite. "We've upgraded our RFP tool — your login is X." 80% of hotels will engage within 48h if the email is short and the login is one click.

8 Run new + old in parallel for 30 days

New RFPs in the new tool. In-flight RFPs stay in the old tool until they close. No "we'll cut over on March 1st" — that's how you lose contracts mid-negotiation.

PRO TIP

Schedule a "migration retro" at day 21. Always something will surprise you — a custom field, a tax rule, a 2-year-old open RFP. Better to catch it 9 days before cutover than 9 days after.

Switch, decommission, and lock in the new normal

9 Cancel the old tool's auto-renewal early

Many vendors require 60-90 days written notice. Submit cancellation in writing as soon as parallel-run starts — not on cutover day.

10 Final data export + cold-storage archive

Pull one last export from the old tool — same scope as step 1, plus the 30 days of parallel data. Store in S3 / Box with 7-year retention (most EU compliance baselines).

11 Update your procurement runbook

The internal doc that says "we use Cvent for hotel sourcing" — rewrite it to reference the new tool. Sounds trivial; gets new joiners up to speed in week 1 instead of week 4.

12 Capture lessons learned and share with your network

Migrations are organisational learning. Write a 1-page retro. What surprised you? What would you do differently? Share it with the planner community.

READY TO MIGRATE?

Start your 14-day Pro trial at easyhotelrfp.com/pricing — no credit card. Day 1 sandbox, day 14 decision. €45/month after if you stay.