

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 →](#)

atlan