INFOPATH MIGRATION
☑ READINESS CHECKLIST

Crow Canyon Software

6 QUESTIONS TO ANSWER BEFORE YOU MIGRATE

This quick checklist helps you determine whether it's time to replace InfoPath and how ready your organization is to move forward—without getting into technical overload.

1. Your Current InfoPath Usage
☐ We use InfoPath forms today
☐ Some forms are critical to daily operations
☐ Forms are still being used by many users
☐ We are concerned about long-term support and risk

2. Forms & Processes
☐ We have multiple InfoPath forms across departments
☐ Forms include approvals or routing steps
☐ Forms collect important business/compliance data
☐ Updating or maintaining forms is difficult

3. Users & Experience
☐ Users access forms in a browser
☐ Mobile access would be helpful
☐ Users complain about usability or reliability
☐ We want a more modern, intuitive experience

4. Automation & Efficiency Goals
☐ We want to automate approvals and workflows
☐ Manual follow-ups or emails slow us down
☐ We want better visibility into request status
☐ Reporting or tracking is important

5. Security & Confidence
☐ Forms contain sensitive or important data
☐ We need role-based access or permissions
☐ Audit trails or history matter
☐ We want a more future-proof solution

6. Readiness Signals
☐ We are actively evaluating InfoPath replacements
☐ We want a low-code or no-code solution
☐ We prefer minimal disruption to users
☐ We want to migrate at our own pace

HOW TO READ YOUR RESULTS

- **Checked 6–10 boxes?** You're likely early in the evaluation phase.
- **Checked 11–18 boxes?** You're ready to seriously explore replacements.
- **Checked 19+ boxes?** InfoPath replacement should be a near-term priority.

NEXT STEP

If InfoPath is holding your processes back, a modern replacement can improve reliability, automation, and user adoption...without starting from scratch.

Email sales@crowcanyon.com to discuss.