



15 Quick Tips for Successful CRM Data Migration

1 **CRUCIAL FUNCIONALITY** 

What functionality have your users come to rely on in the legacy system?

2 **REPLACE / IMPROVE FUNCIONALITY** 

Match or substitute the functionality with customization and third party apps.

3 **INVOLVE END USERS** 

Involve end user ambassadors from the beginning.

4 **ENSURE ALL DATA IS ALLOCATED** 

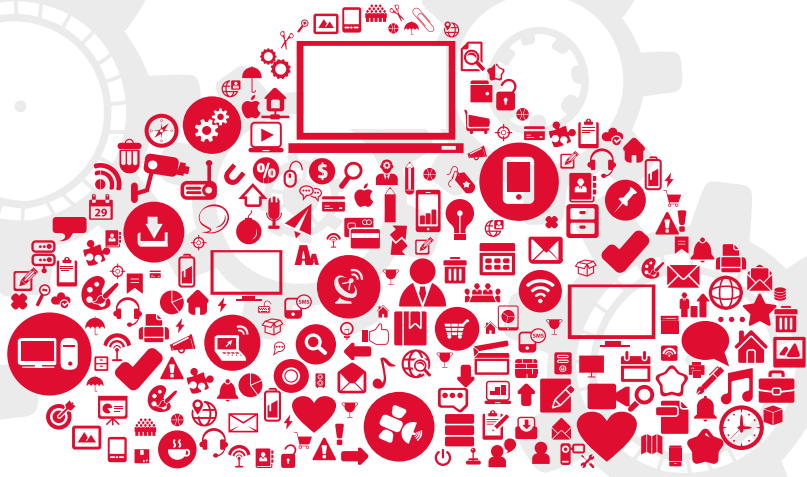
Ensure all key legacy data has planned destination locations.

5 **DATA CLEANSE** 

Decide what data or data fields need to be excluded from the migration?

6 **STAKEHOLDER OVERVIEW** 

Ensure director overview of the full migration.




7 **PLAN TIME FOR DATA EXTRACTION** 


Allow adequate time to extract source data.

8 **PLAN FOR DATA TRANSFORMATION** 

Allow additional time to order and transform source data.

9 **MERGE DUPLICATE RECORDS** 


Unclutter and tidy up data by merging duplicate records.

10 **FILE ATTACHMENTS** 


Decide how to bring out file attachments from legacy systems.

11 **MIGRATION LOCATION** 


Where do you want to migrate those attachments?

12 **TEST WITH STAKEHOLDERS** 


Have a plan and review test import involving stakeholders.

13 **BEST TIME FOR DOWN TIME?** 

Decide the best day of the week for your data migration.

14 **GET THE BALL ROLLING** 

Perform the final data migration.

15 **FINAL CHECKS** 

Data clean up and overlooked data checks need to happen.