CRM Migration Checklist

You are ready to migrate your CRM, but not sure if you are checking off all the boxes needed to get it done right. We're here to help. If you need a migration partner or have any additional questions, email Jason.green@intelestream.net.

1. Administrative

- ☐ Identify data owners
- ☐ Identify data points to migrate
- ☐ Gain owner buy-in
- ☐ Determine project funding and timelines
- ☐ Define security measures
- ☐ Create backup plans

2. Business

- ☐ Create data flow
- ☐ Determine your client data needs
- ☐ Identify new data source
- ☐ Meet with sales team and detail their needs/territories, etc.
- ☐ Confirm data repositories that need moved
- ☐ Detail new data structure

3. Migration Assessment

- ☐ Determine what databases and data need transferred
- ☐ Determine company or contact focus
- ☐ Analyze data (find duplicates, inconsistencies, etc.)
- ☐ Quantify data transfer load
- ☐ Set data setup requirements in new system
- ☐ Review new CRM data needs for integration

4. Resource Review (Answer these questions)

- ☐ What are your internal resources?
- ☐ Who is responsible for testing?
- ☐ Are external resources needed?
- ☐ Will you use any additional integration tools?
- ☐ What's the breakdown of automated vs manual?
- ☐ What is the total cost (internal, external, etc.)?

5. Migration Process

- ☐ Map fields between old and new systems
- ☐ Doublecheck inconsistencies and duplicates
- ☐ Clean data
- ☐ Train users on new CRM

- ☐ Ensure backup availability
- ☐ Run tests and analyze. Repeat.
- ☐ Don't forget to check audit trails
- ☐ Reserve down-time window
- ☐ Run migration

- ☐ Check results
- ☐ Have team ready for migration

- ☐ Cut-over to new system
- ☐ Conduct secondary training
- ☐ Access implementation strategy