10 Traps to Avoid when Migrating from ACT!

Migrating from ACT! to a new CRM system can be a nightmare or a dream, depending on how the project is approached. Following many years of experience with ACT! migrations, InaPlex is familiar first hand with the types of things that can go wrong, many of which can be avoided.

Here are 10 of the more common traps to look out for when migrating from ACT!

1. Ignoring Different Relationship Structures in Your New CRM System
   Your new CRM system will probably introduce some different relationship structures and you need to think about where and how you use your existing ACT! data. For instance, leads in ACT! are always a contact but if you're moving to Microsoft Dynamics CRM leads can be independent of the contact structure, so you need to decide whether or not some contacts are to be brought across as leads. Make sure you understand the new system's data structure and capabilities and take this into account when moving your ACT! data.

2. Relocating “Dirty Data” Before Cleaning it Up
   Your ACT! data may have inconsistencies or errors so try to identify these before migration. Typical errors are fields that have been treated inconsistently (for instance, names, dates, phone numbers, states and countries, and sales codes) or are just plain wrong (clients may be duplicated or incorrectly assigned). Avoid transferring “rubbish” by identifying and fixing ACT! data as part of the migration process.
3. Forgetting About ACT! Contacts That aren’t Tied to Companies

Although ACT! doesn’t force users to link contacts to companies, your new system probably will; most CRM systems favor an account–company structure. If you happen to have contacts that are not linked to companies it is a good idea to make sure they are linked to one as part of the migration process, which will generally involve matching on the company name in the contact. If these names are inconsistent, you may end up with multiple accounts for what should be a single account.

4. Paying to Migrate Everything – Even if it Isn’t Needed

Although it’s possible to transfer everything to the new CRM system, there’s no point cluttering it with data that isn’t actually needed. Some companies decide to only transfer 5 years of history, for instance, or limit the number of linked documents brought across – especially if migrating to an online CRM system that charges for storage.

5. Creating Duplicates from Multiple ACT! Databases

Many clients have multiple ACT databases, however merging these during a migration can result in duplication, incorrect data and/or missing linked data, such as history and contacts. You may also have a cloned database (which you may or may not know about) which can be bad news for migrated data. If you have multiple databases (and/or clone databases) manage these carefully to avoid creating data problems in the new system.

6. Assuming the Migration Will be 100% Automatic

If you’re using a tool to help with your migration don’t be surprised if it won’t automatically migrate everything, especially if you have a large, complex ACT! database or any customizations. Check that migration maps are comprehensive, and be aware of any omissions. Also find out how well the migration tool supports customizations; does it have strong data matching and data manipulation? Can standard maps be easily customized? Is it easy to have trial runs and trace errors? What sorts of hidden costs are there? If you’re using a third party and you’ve nailed down the details, go for a fixed price quote (without caveats) to limit costs and risk.
7. Leaving “Drop-Down” Lists Behind by Accident

Remember your drop-down lists in ACT! as they may work differently in the new system. If you want to change them (for instance, if you decide to introduce new sales categories), make sure that they can be remapped in the migration process, and understand the impact on reports and business processes.

8. Losing Emails Because of Different Email Types

An ACT! database may have multiple email file formats which will have to be transferred differently. Make sure you identify the email types you are using (ACT!, .ima files, Outlook .msg files), and have the correct migration approach for each, otherwise, you may find at some point that emails seem to have "disappeared".

9. Overlooking Customized ACT! Fields

If any of your ACT! fields were customized, and there is a good chance that at least some of there were, these fields need to be clearly identified when migrating, especially when looking at automated migrations. As a general rule, the more customization you have, the less automated the migration will be, so you will want to make sure you have the tools and expertise to identify and transfer customized fields.

10. Neglecting Record Ownership and Security

You might want to replicate your ACT! ownership and security in the new system, or you may instead want to take advantage of the features introduced by your new system, or it may be a combination of both. What you don’t want to do is forget this area – make sure the migration the structure you want for record ownership and security.

Your ACT! data is a valuable resource and you want to make sure that it’s transferred safely to new CRM system, and also used wisely there. So spend some time at the outset thinking about the information you already have, what you want to achieve in the new system, how this affects processes and data flow, and what this means for the data migration process. This will help avoid migration traps and give the most return from your CRM investment.

At InaPlex we’ve been managing CRM migration projects for over a decade, and we are always happy to provide advice. Feel free to book one of our no-charge, no-obligation webinars where our technical team will give you some pointers, or learn more about our migration solutions at www.inaplex.com.