A COMPLETE GUIDE

TO THE PERFECT CRM MIGRATION

2017

InaPlex

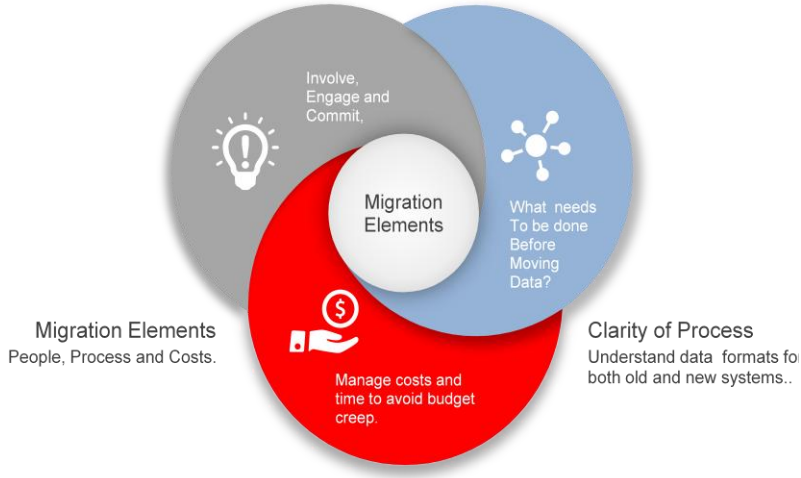
Migration Matters

InaPlex CRM Integration

CONTENTS

The Secret: Proper planning and preparation.

The Result: The best data transfer outcome for the time and money available.



Introduction

It's no secret that moving client data to a new CRM system can be challenging, however whether your CRM migration is smooth sailing or a rough ride is ultimately up to you.

With over a decade of extensive experience migrating CRM systems, my team and I have found that a few simple steps can circumvent most of the pitfalls associated with migrations, This Guide shares our experience with you.

Before I dive into our proven approach, however, let's take a look at why CRM migrations can be so difficult. This will help you appreciate and make full use of the steps we provide later in this Guide for transferring client details to the new CRM system.

Why CRM Migrations Can Lead to Tears?

– or how to avoid a migration breakdown

40% (or more) fail

OK, perhaps I'm exaggerating, I haven't actually seen consultants sobbing, but I have seen some CRM migrations get pretty fraught.

The statistics support this with estimates of failed migrations ranging from 40% to 80%, and we've certainly been asked many times to "fix" migrations that have gone wrong.

And this is probably the key point. If something does go wrong the process of rectifying the initial problem is often time consuming and costly. It is definitely better to get the migration setup correctly the first time around.

Why do they fail?

So, what sorts of things go wrong when moving to a new CRM system?

There are three main categories of problem we've identified. First, there isn't a solid understanding of the data to be transferred so unexpected difficulties arise.

Second the target CRM system hasn't been setup properly to receive the data being moved.

Third, the tool being used to facilitate the migration doesn't provide the functions needed. Other factors also come into play but these are the most common.

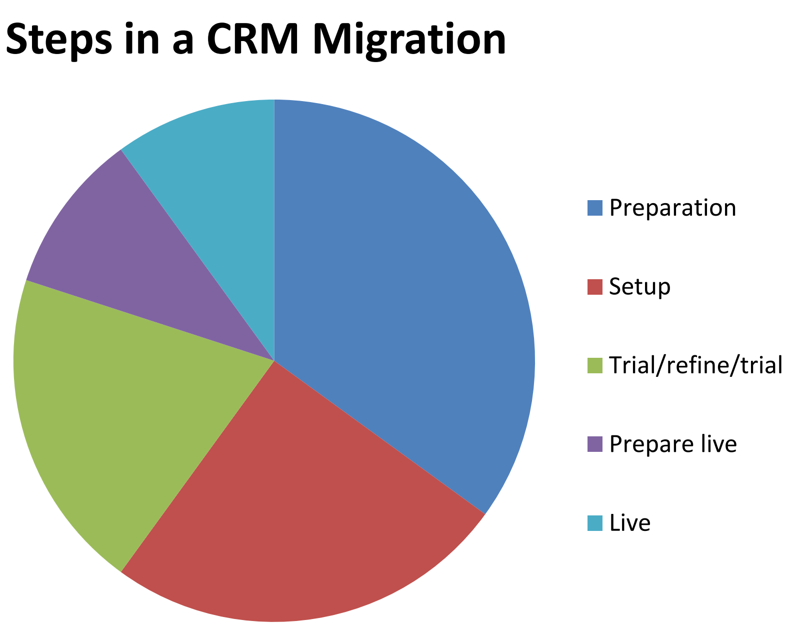
In general, the old CRM data is rarely in a format where it can just be copied across to the new system. There is usually a lot of work to do before any data transfer can commence and if it isn't done properly this is when things can start to go wrong.

Know Your Data
– data discovery and management

Given the challenges of migrating CRM data, should you just reconcile yourself to having problems?

No, not at all!

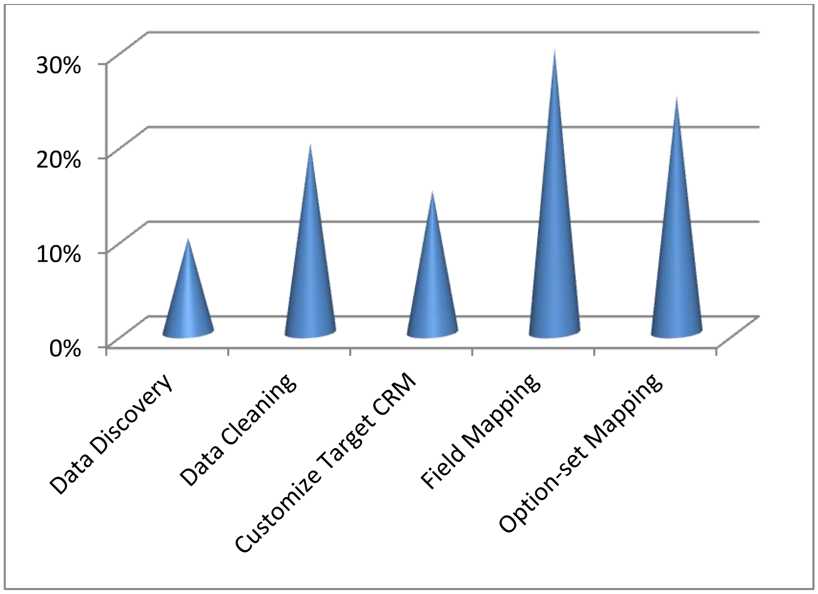
We've found that following a few simple steps can avoid the problems associated with moving to a new CRM system. We routinely use this approach to complete projects with competitive fixed price quotes, so we know it works. The main element is data discovery – making sure you thoroughly understand the data to be moved.



The key steps we follow in a migration can be seen in the pie chart to the left and it's clear that Preparation is especially important. This is the case for technical and business groups.

The next page breaks down the main technical tasks during the preparation phase.

In general, it is advisable to spend a lot of time up front making sure the data and any associated problems are fully understood.



MOST EFFORT GOES INTO UNDERSTANDING AND PREPARING CRM DATA TO BE MOVED

PRODUCTIVITY INCREASES WITH USE OF THE RIGHT MIGRATION TOOL

TEST, REFINE, TEST AGAIN. KEEP DOING UNTIL THE RESULT IS RIGHT.

Data Preparation can consist of many steps, however the ones we focus on involve understanding the data and preparing it for transfer.

Data Cleaning is part of this phase if it is performed by the business users, otherwise criteria for automated cleaning are specified at this step and implemented in the setup phase.

This phase looks at typical data problems, as well as any that are specific to the incumbent CRM system. General project criteria are also considered, including resource issues. Guidelines can be found in the next section.

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Data Problems
– issues to look out for

Every CRM Migration is unique.

You may be moving from a homegrown CRM system, an obsolete database, or one of many commercial solutions. You might be going from on-premise to the cloud. And you will probably change several business processes as part of the move to a new CRM system.

Because each migration is different, there is no single formula for all migrations. Nevertheless, there are some problems that almost all migrations have in common when it comes to moving data across. The table below provides a summary of the main things to look out for when moving from an existing CRM system to a new one.

DO YOU HAVE HARD DEADLINES TO WORK TO? IS THE BUDGET FIXED? ANY RESOURCE CONSTRAINTS?	Data structures differ, for instance going from contact centric to company centric so that data needs transforming.	Data is dirty – duplicated, inconsistent incomplete; client details will need cleaning before migration.
Historical data may be obsolete or simply no longer relevant so records no longer needed have to be identified and removed.	IF YOU'RE MOVING TO THE CLOUD STORAGE COSTS CAN BE HIGH SO YOU ONLY WANT TO MOVE DATA YOU NEED	Emails, notes and other attachments can be difficult to move and problems are often CRM system specific. They can also take up a lot of space in the new system.
Relevant business groups are not involved so data may be missing and ownership and responsibility unclear.	Are there drop-down lists, or pick-lists, to transfer? These can be difficult to map from one system to another: business needs to be involved to define new.	HOW BIG IS THE WINDOW FOR TRANSITION TO LIVE? IS SPEED OF MIGRATION GOING TO BE A POSSIBLE ISSUE?

CRM Migration Checklist

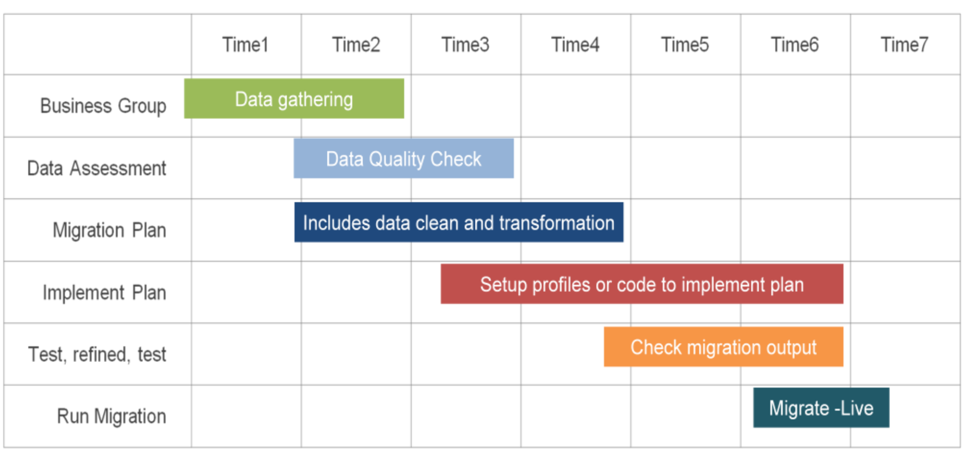
– checklists help planning and clarify responsibility

So far I've focused on making sure you understand the problems that can be involved in a migration. The entire process, however, will benefit from clear and agreed planning. For this we recommend a checklist.

Here are 7 categories we normally include to make sure relevant people are involved and major tasks are managed (see our standard migration checklist for full details) and we also recommend use of a planning tool to manage timelines and resources.

- Administrative Preparation
- Business Preparation
- Data Migration Assessment
- Data Integration Assessment
- Resources Review
- Migration Setup
- Migration Test Run

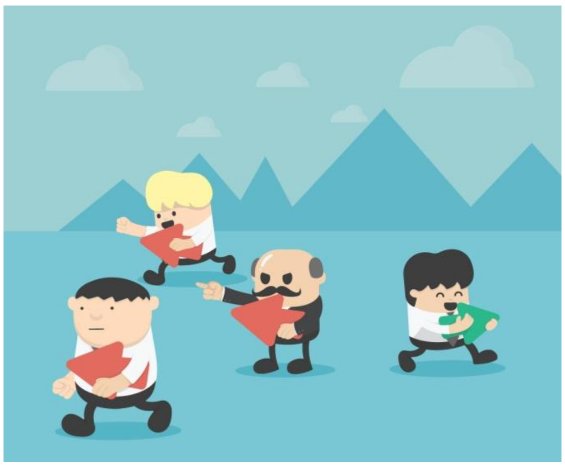
CRM MigrationManagement Gantt Chart



Project Management tools are always a good way of managing resources, and constraints, and worth using for many large CRM migration projects.

Migration setup

– building code or profiles for moving client details



While it might feel like it's taken a long time to get to this point, I can't stress enough that proper preparation is imperative for a successful CRM migration. All the work you've done so far – understanding the data, finding out how it needs to be managed, making sure the new system is setup correctly, ensuring all relevant parties are involved and committed – comes together as you start to build the processes needed for migration to the new CRM system.

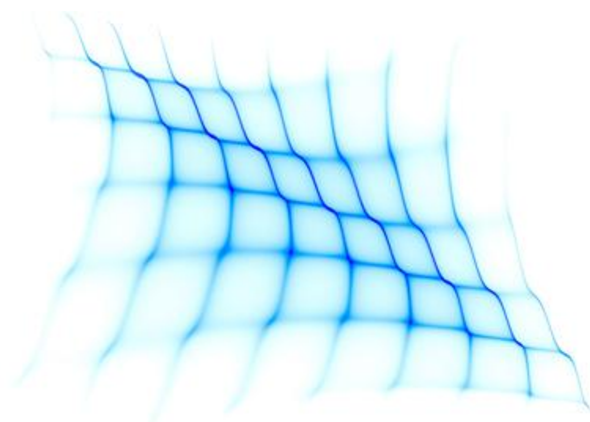
But what, you may ask, do you actually setup? Well, that will depend on the approach your Company has selected for managing the migration. Are you using specialized tools? Do you expect to get a high degree of automation? Are you using in-house teams, external specialists, or a combination of both? The tools used, and types of experience of the migration team, will dictate how you mange the data challenges that you've already identified. Ideally you would automate the entire process, however as I've already noted, this is rarely feasible. Some suggestions are below and on the next page.

Possible Solutions	Advisable? Yes/No	Rationale
Fully Automated Migration System	✗	I'm not saying don't try for this, however a fully automated migration only works for very few
Fully Coded migration approach	✗	Coding the entire migration from scratch will be expensive and time consuming
Full or partial use of commercial tool	✓	A purpose designed tool, including automated elements, will save time and money.

IN-HOUSE, NO TOOL

This option can look cheap, especially if you've got resources on the bench, however it is more prone to error and is likely to take longer than other options. It will often involve a lot of coding, and if the team is not experienced with migrations data may be missed. It's usually false economy.

My company has had to "fix" migrations that have gone wrong on several occasions. The cost of repairing a botched migration is usually more expensive than doing it right from the outset. The client has also had to write-off costs from the technical team and from missed deadlines.



IN-HOUSE, SPECIALIZED TOOL

For many companies this is a great option, especially if you have experience teams and an appropriate tool. Thorough planning and preparation are especially important with this approach to make sure the migration tool has all the features needed and will perform as expected.

EXTERNAL MANAGEMENT, SPECIALIZED TOOL

Giving an experienced external party responsibility for most or all of the migration is often the fastest, safest and cheapest approach. Benefits include access to relevant experience, no need to source and assess migration tools, no need to learn a new system. If you get a fixed price quote as well then this will remove any risk.

If you are working with a third party you may also want to discuss any ongoing requirements with them. Your CRM system will have native links to other systems, but if they don't cover everything you need see if the migration tool can also be used for integration projects, as well.

Useful SQL

– whichever data transfer approach you use

Migrations normally need to find, select and manipulate data at some point and SQL can be really useful for this.

The problem is, different source and target CRM systems can have very particular requirements. For instance, when moving GoldMine emails it’s helpful to know that they use a non-standard MIME format which requires special treatment. So while some SQL statements are general or variations on a theme and easily tweaked, others are one-offs.

Here we provide a range of SQL statements that can be used to assist the migration process. It will be clear with some how they can be adapted for a different CRM system however if you have questions, or would like help with a certain CRM system, please get in touch.

This is a generic SQL statement that can be used to find history activity relative to a date or range of dates. It’s helpful for finding active clients.

Select accounts that have a history activity completed since 2015-01-01

```
select a.* from sysdba.account a where
a.accountid in (
 select distinct  h.accountid from
sysdba.history where h.completeddate >
‘2015-01-01’
)
```

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List and count the different values in a column of a table – for example the KEY1 field of the GoldMine CONTACT1 table:

```
select key1, COUNT(key1) from CONTACT1
group by KEY1
order by COUNT(key1) desc
```

This SQL query is easy to generalize across CRM systems and for different fields to find values and frequency of recurrence, for instance to find duplicates.

This SQL statement is useful for pulling together multiple rows of data into a single row, The example is for GoldMine, however the general principle can be used for any system. Ask us for advice with a specific system.

Pivot multiple rows into a single row – for example, find multiple email addresses for a single GoldMine contact, and put them into a single row:

```
select accountno,
      MAX(case when rowno = 1 then email end) as
email1,
      MAX(case when rowno = 2 then email end) as
email2,
      MAX(case when rowno = 3 then email end) as
email3
from
       (select accountno, row_number()
over(partition by accountno order by contsupref)
as rowno,
      case
            when ADDRESS1 is null then CONTSUPREF
            when ADDRESS1 is not null then
contsupref + address1
            end as email, zip
            from CONTSUPP          -- 7851
            where CONTACT = 'E-mail Address'
            ) as e
group by accountno
```

Find the most recent activity for a contact in a GoldMine database – a similar principle woud apply to other CRM systems being migrated:

```
select c1.accountno, c1.company, c1.CONTACT, act.lastdate, CAL.* from CONTACT1
c1
      inner join (
            select accountno, MAX(ondate) as lastdate from CAL
            group by ACCOUNTNO
            ) act
      on c1.ACCOUNTNO = act.ACCOUNTNO
      inner join CAL on c1.ACCOUNTNO = CAL.ACCOUNTNO and act.lastdate =
CAL.ondate
```

Find the pick list values for the company status field in a Sage CRM database:

```
select * from Custom_Captions

      where capt_familytype =
'choices'

      and capt_family like
'comp_status%'

      order by capt_family
```

Although this SQL is specific to a migration from Sage CRM a similar approach would be used with the corresponding fields with any other CRM system with pick-lists to transfer. We are able to provide a similar listing if advised of the CRM system.

The SQL updates a table in one database from a table in a different database. It's very useful when you need to restore particular field values from a backup database. In this example, we are updating the company primaryuserid field in a CRM database from a backup.

```
update crm.dbo.company set
comp_primaryuserid =
c2.comp_primaryuserid

from crm.dbo.company c1 inner
join crm2.dbo.company c2 on

 c1.comp_companyid =
c2.comp_companyid
```

Conclusion
– InaPlex can help with your migration

To learn more, please visit www.inaplex.com for additional resources, to download a free trial or to contact us. My colleagues and I are happy to:

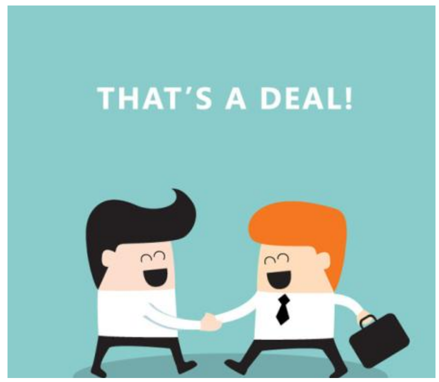
give free advice

help build an SQL statement

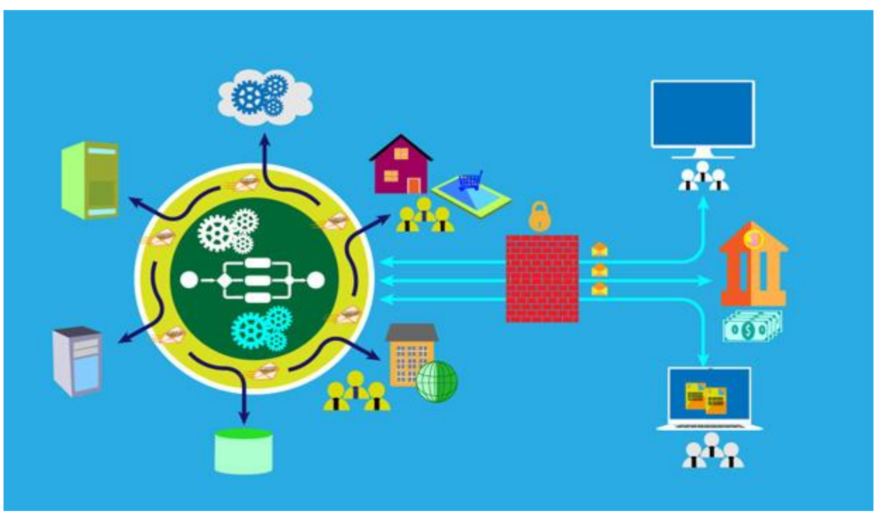
find an InaPlex Partner near you

book a demonstration

provide a fixed price quote



Please also feel free to contact us about CRM integration or the development of Enterprise Apps.



Whatever approach you've selected for your CRM migration, I hope you've found this guide helpful, and I wish you all the best for a fast, painless move to your new system.

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