CRM Migration Planning Guide

Simple Steps to a Successful CRM Migration

InaPlex Services Group

1. Migration Preparation

1.1 Setup Migration Team

Getting the right people in the CRM migration Team is imperative. If the wrong departments, teams or people are involved it can lead to a swathe of difficulties, such as omitting data and ending up with information that is misaligned with the business objectives. The migration team needs to include relevant migration experience and skill sets for the new CRM system, as well as representation from both Business and IT Groups.

1.2 Define Business Objectives

It's easy to fall into the trap of replicating the old CRM structure instead of embracing the functionality of the new system, so it is important to clarify business objectives and the implications they have for setting up the new environment. Objectives range from high level reporting needs, to data requirements of new services and sales lead management processes, and all affect the way that client information is moved and stored in the new CRM software.

1.3 Map Business Processes and Data Flows

Mapping business processes provides an understanding of current and proposed data flows, and the information needs of the new CRM system. The step helps identify setup needs of the new system by highlighting:

- All data required in the new CRM system
- Data transformation needs
- New data-types to be setup, such as pick-lists and follow-up flags
- Implications for new data flows

The importance of this step cannot be overstated. Some of the biggest migration challenges come from differences between the old CRM system and the new one, such as moving from contact-centric to account-centric and mapping to new pick-lists, so the more that is done to quantify these differences, the smoother and more accurate the final migration will be.

2. Assess Data Quality

2.1 Check for Duplicates

Duplicated and/or inconsistent client records often accumulate in databases, especially with older CRM software, and they need to be identified and managed – deleted, merged, or renamed, as appropriate – so that dirty data isn't transferred to the new CRM system.

If you are using a migration tool it should have the functions that will catch and fix duplications, otherwise, specialized de-dupe software may need to be acquired.

2.2 Find Dirty Data

Poor quality client data is a common problem, even where companies have stringent processes to help maintain data integrity. Incomplete, inconsistent or incorrect client details can infiltrate the client database, especially when information is captured from a variety of sources and across many touch points, and without correction will corrupt the new CRM database.

It is important to identify and check all databases being transferred. If problems are found with any data, measures need to be taken to clean data before it is migrated to the new system. Identifying and cleaning dirty data is often built into migration tools or can be managed with SQL and one-off code.

2.3 Identify Data Structure Discrepancies

Data formats in the new CRM system can vary considerably from formats in the legacy system. Typical examples are differences between drop-down lists, going from contact-centric to customer-centric systems, or moving blocks of data such as emails, history and notes, to a new format. If new data structures are not accommodated (for instance by remapping from one structure to another) then information moved from old system will not be represented correctly in the new system.

How format changes are dealt with will vary depending on the type of information involved. Options include setting-up data matching and transformation rules, specialized mapping, or possibly limiting some of the data that is brought across. Functions designed to overcome format issues are often an integral part of the migration tool and can help identify and manage data structure discrepancies.

3. Migration Fundamentals

3.1 Confirm Ownership

Even with all the right people involved in the CRM migration, without clear and agreed ownership there are delays, and even stalemates, that can occur. Typical points of contention are between the IT and the Business Groups, however there can also be confusion within groups. Businesses may need more granularity over who "owns" certain clients, sales teams or territories, while IT may have conflict over tasks, tools or procedures. In general, the more carefully ownership and responsibility can be agreed, the less chance there is for confusion, omissions, or duplicated effort.

3.2 Clarify Business Objectives

Business objectives have a huge impact on how the new CRM system is structured, and what information needs to be migrated across. CRM systems today deliver far more functionality than their predecessors, such as deep analysis, smart forecasting and personalized services, however this also means they are more complex and can require considerable setup.

A clear view of what CRM needs to provide from a business perspective shapes the configuration of the new CRM system and highlights data requirements. In terms of the migration, it can dictate how much information needs to be moved, where it needs to be transferred to, and the format it needs to take.

3.3 Identify Deadlines and Obstacles

Many factors can impact the progress of a migration. Some are integral to the project, such as data quality and scope, while others are external to it, such as budget and operational deadlines. Companies need to balance constraints against business objectives to determine what the migration can realistically achieve.

For instance, while most companies start with the goal of migrating everything across to the new system, issues such as poor data quality, incompatible formats, budget limitations or a hard go-live date, can make this impractical. While anything can be done with enough time and money, feasibility also must be taken into account.

3.4 Setup Data Monitoring Procedures

Even with careful planning and preparation problems can arise. Regular monitoring, for instance random data reviews at agreed points, can help catch problems before they become major issues. Setup checks and balances in advance to enforce the discipline of regular checks.

4. Construct a Project Plan

4.1 Consolidate Pre-planning Results

After initial preparation the following information should be available:

- Quality and quantity of customer data to be transferred
- How the new CRM is to be setup and the impact of this on data transfer
- What data is needed to achieve business objectives in the new system
- Composition of the Migration Team
- Clear responsibilities and buy-in from all members of the Migration Team

These structural elements form the foundation of the migration and need to be clearly identified (possibly as part of a setup project) before putting a data migration plan in place.

4.2 Select a Project Management Tool

A project can be managed in many ways, ranging from lists and spreadsheets to specialized applications, and the approach selected will depend on many factors including project complexity, resources, personal preferences, and company standards and policies.

Whatever the approach, it should at least accommodate the following functions:

- Budget Management
- Resource Management
- Task Management
- Milestone Tracking
- Reporting (preferably Gantt Charts)

4.3 Setup Project Plan

Once the foundational information is ready, and the project management approach selected, the project details can be entered. Sensible milestones help track progress and identify potential slippages, and a smart breakdown of tasks can make sure that migration actions are tackled in meaningful chunks. Interdependencies need to be included, and resource and budget information as needed. Key project phases will include preparation, setup, trial run(s), testing and live operation, with a strong emphasis on pre-training, testing and sign-off.

5. Migration Set-up

5.1 Build Migration Jobs

Most companies use a specialized migration tool for their CRM migration as it is tailored to the migration process, will have connectors for a least one of the CRM systems, and can normally offer a degree of automation.

An alternative to using a third-party tool is to use SQL or develop custom code to manage the data transfer process. This approach tends to be more time consuming and risky, and does not usually have add-ons such as secure testing, data cleaning, or matching and data transformation tools

5.2 Configure the New CRM System

The new CRM system needs to be configured and setup prior to moving across any data to make sure that client information is stored appropriately in the new CRM environment. Setup needs to include drop-down lists, new teams and groups, new project formats, additional or changed fields and sales monitoring processes.

5.3 Manage Data Integrity

Every migration is different however managing the integrity of transferred data is crucial and includes the following:

- Correct identified duplicates
- Clean dirty and incorrect data
- Cross-match pick-lists / drop-down lists
- Transfer emails/notes/history
- Move customer and account details
- Transfer sales, teams and project tracking details

Moving so many different types of data requires strong data matching and data manipulation capabilities, and much of this will be built into the migration profiles. Make sure the Migration Tool has functions that can easily meet the company's data management demands.

5.4 Verify Reporting Requirements

Check that the new CRM setup can produce the reports required for users and management. This can provide a double check of whether setup is correct, and also confirm which information needs to be transferred, and how and where it needs to be stored.

6. Pre-Live Check List

6.1 Final Check list

Even when the migration project is progressing smoothly, there are several areas where a final check is worthwhile, including:

1. Backup Processes

    i. Never start live runs without a series of verified backups that will allow easy roll-back if needed. There are many tools, and on-line guides, that can help with this if formal backup procedures are not already in place.

2. New System Setup

    i. Check that the new CRM system has been fully configured and that the setup supports the user needs – data flows, sales methodology, end-user apps and business objectives. Also verify that the setup generates the reporting required. This step guards against moving data to locations that to not deliver the expected results.

    ii. Check that the new system setup makes it difficult to enter incorrect or incomplete data where this is important for the company.

    iii. Ensure tight security is in place that reflects responsibilities and authorization levels of users, and also allows relevant access for testing and sign-off.

3. New System Training

    i. Full training on the new system is needed to allow post migration testing and signoff. Training prior to live also smooths the transition to a new system, leading to reduced frustration and stress, greater productivity and faster results.

4. Data Source Verification

    i. Double check that all data sources needed migration have been located and checked for integrity, and where needed processes to clean and transform data are in place (if data scrubbing and de-duplication have not already been done).

7. Commence Migration

7.1 Test Runs

Once all preparation is complete and jobs are ready to go, a succession of reversible test runs is recommended to:

- check data is being moved correctly and that data transformations have been applied
- Check that duplicates have been caught, and data cleaning rules applied (assuming this was not already part of a separate data scrubbing exercise)
- Check transactional integrity
- Verify that data has been moved to specified location in new CRM environment
- Make sure any specified flags have been activated correctly
- Identify and unexpected data outcomes

7.2 Live Run(s)

Most migrations are broken into sections, with live runs for different data types. For instance, a live run for contact details, another for history items, one for emails, and so on. Backup processes should be vigilantly followed during testing and live runs.

Each run will concentrate on different types of data transformation. Contact details may go from contact-centric to account-centric, so the mapping for this would need to be checked. Emails may go from an old format to a new format, so this aspect of the data transfer would need to be assessed. Notes, opportunities, custom entities and activities are other examples of data types that will have unique rules to adhere to.

Testing should be conducted after each run, and then at the end of all runs. And the testing process needs to check for general integrity, as well as changes specific to the information being moved. Testing is usually conducted separately by technical and business groups and sign-off by both groups is imperative.

Remember to consider migration times and plan around these so that live operation isn't impacted.

7.3 Live Operation

Live operation can commence following all testing and sign-off, however it can be a good idea to keep a skeleton team in place to deal with any unexpected quirks with the new system. Experienced users should also be on hand to guide and advise on use of the new system as part of smoothing the transition to the new environment.

8. Ongoing CRM Success

8.1 Ongoing Data Transfer

There may be a continuing need for data transfer to the new system. Some of this will be frequent and require implementation of an integration channel, some will be ad hoc and occur as needed. Where possible, used a single tool for all data transfer needs.

8.2 Ongoing Training

Training on the new CRM system will need to continue. As users become increasingly familiar with the system they will use more and more of the extensive CRM functionality. Keeping users comfortable with extending their use of the system will increase returns from the CRM investment, and more content and productive users.

8.3 On-Premises and Cloud

Even if all CRM data is in the cloud, there may still be a requirement for information kept on-premises. Keep the data flow between these two distinct environments fast and seamless to avoid poor data access and frustrated users and clients.

8.4 Integration

No matter how much data is captured by the CRM system there is still often a need to link to other systems for a complete client view. Implementing integration with other systems at the outset will often be needed for systems that support the sales processes. These include connections to multiple touch points, marketing links, data analysis tools and more. Sometimes all the functions you need will be available in the CRM system, often, however, they are not and seamless integration is needed for smooth operation.

8.5 Custom Apps

No matter how well the new system is setup, markets and businesses change, and the CRM system must continually adapt. New apps or extensions to current functions may be needed, for instance for better analytics, predictive analysis or marketing services.

Where unique services are offered, an off-the shelf app may not work. Customizing modules, or having custom apps developed specifically for your services are another option in this instance.