FAQ FOR CRM MIGRATIONS

CRM Migrations

Useful answers to frequently asked questions for moving to a new CRM system.

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1. Project Overview Considerations

- ### How much does a typical CRM migration cost?

  The cost of a migration depends on many factors including the quality of the data being transferred, how much is being moved, as well as the complexity of the information being transferred. An estimate for the migration should never be made without an assessment of the data to be transferred, and if using a third party for the migration a fixed price quote should be sought.

- ### How long does a CRM migration take?

  Most of the time involved in a CRM migration is spent in preparation, for instance, data discovery, data cleaning, new system setup, and mapping. The overall time varies considerably depending on volume and quality of data involved, however as a rule of thumb expect the following time ratios:

  Preparation: Transfer: Testing ➡ 8: 3: 2

  The actual transfer of data is only one component of the migration. For small to mid-sized companies moving data across (including the setup of jobs and maps) might take a week or so. The overall migration project can take much longer, however, by the time preparation, training, and testing are included. A realistic estimate needs to take all factors into account to ensure that business expectations are met.

- ### Can a CRM migration be automated?

  Many CRM migration tools have an automated component for easy to move information such as client details, however few migrations can be completely automated. Highly customized systems, complex data entities (such as emails and history) and different data structures across systems (for instance moving from a customer-centric to account-centric format) are examples of areas that are difficult to automate.

  Problem areas are different for every CRM solution, so any automation must be compatible with both the legacy and new CRM systems. There also needs to be clarity and agreement on exactly what data is going to be transferred, as different entities within the legacy CRM system will have different challenges.

  Even where the process is not fully automated, pre-set maps can provide a useful template if they can be easily modified and adapted to a company's specific requirements. If you use an automated approach, make sure that it will completely transfer everything you want moved, and that it can be modified to accommodate changes for areas that cannot be automated.

2. Project Set-up Considerations

- ### Who should manage the CRM migration?

  There are often multiple data owners in a company, ranging from technical and analytical to sales and administrative, and this affects ownership of the CRM migration project.

  Many companies will have a business owner and an IT owner with responsibilities shared according to skills and experience, other companies may assign project ownership to IT, or sales, or even accounting. While it can be debated where project ownership should reside, the important point is to ensure that there is clear responsibility for, and ownership of, the migration process, or assigned elements of the migration process. Ambiguous responsibility invariably leads to confusion and mistakes.

- ### Who should perform the CRM migration?

  CRM migrations are a team effort. Even though the actual transfer of data will typically be performed by a technical person (employee, partner or consultant) business users frequently drive the overall process – what information needs to be moved, how it should look in the new system and where it fits with business processes. For this reason, a well-represented migration team is imperative.

  An experienced project manager is also recommended for larger or more complex migrations to manage the migration process overall, from resources and budgets, to constraints and progress.

- ### When should the new CRM system be configured?

  The new CRM system needs to be setup and configured before data migration to it to allow correct placement and formatting of all transferred information. As an example, new pick lists (drop-down lists) need to be setup in the new system so that picklists from the old system can be transformed and placed appropriately.

- ### When should training on the new CRM system begin?

  Training on the new system should be started early in the project. Knowledge of the new system is needed to develop and run testing programs, and effective testing is imperative for verifying that data has been transferred correctly – the right data, in the appropriate format, and in the expected location.

  Solid familiarity with the new system prior to live operation also boosts user confidence and leads to faster adoption and better use of the new system.

3. Data Queries

- **Can data be moved from on-premises to the cloud?**
  CRM migrations can go from on-premises to cloud, cloud-to-cloud, or even cloud to on-premises. The main consideration is one of speed when moving across these environments, especially with the final migration runs, when access to the live system is often constrained.

- **Should ALL data be moved to the new CRM system?**
  Moving to a new CRM environment is the perfect time to rationalize what information is really needed in the new system. How much old CRM data is moved across to the new system depends not only what is needed, but also on what is feasible. For instance, if client history over 5 years is rarely accessed but it would take several days to move across, then it may be wiser to archive some of the historical information and only move more recent records.

- **How Should Duplicates be Managed?**
  Duplicated information is a common problem for many companies. Left unchecked it wastes money in direct marketing costs, can result in misleading analytics, and ultimately undermines the integrity of the company in users' eyes. For this reason, duplicates need to be identified and managed (deleted, merged or updated) before transferring information to the new system. This can be done manually, using a CRM migration tool, or with de-dupe software.

- **Does dirty data need to be scrubbed before migration?**
  Dirty data includes badly structured details, poor spelling, inconsistent formats (such as data and country codes) and noise words – basically any errors that impede reliable selection of information for marketing initiatives and sales operations. Inconsistent or incorrect information must be identified and corrected before moving it across to the new system to avoid duplicating the errors in the new system. Strong matching and transformation tools, such as those found in CRM Migration engines, or specialized data scrubbing tools, can be used to clean data prior to migration.

- **How can clean data be guaranteed in the new system?**
  To ensure transferred data is correct in the new system it needs to be cleaned and transformed prior to migration and moved to the designated location in the new system. The process of maintaining data integrity is an ongoing process in any system. Client moves (from death, marriage and relocation) and problems with input (sloppy procedures, errors or third-party imports) all affect data quality, even where there are good controls in place. For this reason, data quality reviews should be a regular part of data quality maintenance in the new CRM system.

4. Data Transfer Queries

- ## How should data be transferred?

  There are many ways data can be moved from one CRM system to another. Companies can opt to write code and use SQL, or to use a third-party tool developed specifically for CRM migrations.

  In-house solutions can appeal as they initially look like a quick and easy approach, however if there is any complexity in the data being moved, coding from scratch rapidly turns time-consuming and expensive.

  Commercial migration tools are designed to manage the specific challenges of CRM migrations, and usually have an emphasis on strong matching, data cleaning and transformation, and testing (audit) functions. Although they require an initial investment for purchase and training, the costs are normally offset quickly with a faster and more accurate migration result.

- ## Are there benefits to outsourcing the migration?

  Several companies provide a full migration service that can save considerable time and money for the migration project. These companies often have a high degree of migration experience and tend to get reliable results quickly, however if data problems are not clear at the outset, or if expectations are not in sync, costs can blow out quickly.

  To avoid unexpected costs, and/or limited results, make sure that specifications are tight - no quote should be given before looking at data and confirming broad objectives – and fixed price quotes can be provided.

- ## Is a sandbox needed?

  Most migration projects will benefit from a sandbox to allow safe and secure testing. Thorough checks and signoff at key steps is crucial for making sure that data has been transferred correctly, and that data integrity is maintained in the new system. The better migration tools include test roll-back, preview panes and audit trails to help manage the test process. A rigorous back-up procedure should also be part of the migration approach.

- ## What happens if the data transfer fails?

  There are many steps that will help prevent the data transfer from being a failure. Careful preparation, a sandbox and strong audit tools, solid data monitoring and checks, and rigorous test and sign-off procedures all help ensure a successful data migration. If, despite all this, errors occur, access to verified backups will help restore the database to a clean point so that errors can be rectified, and a successful migration run performed.

5. Ensuring a Successful CRM Project

- ## What are typical problems for a CRM migration?

  CRM migrations are routinely affected by a wide range of problems including:

  a) Dirty data
  b) Duplicates
  c) Omitted, or "forgotten", data
  d) Changing data structures such as:
     a. Moving from customer-centric to account-centric
     b. Changing from one email format to another
  e) New formats from changed business processes:
     a. Re-assignment of sales people
     b. New lead management
     c. Changing pick-lists
  f) Large volumes of data
  g) Conflicting responsibilities
  h) Lack of required skills
  i) Poor training on the new system
  j) Insufficient testing of trial data moves
  k) Poor back-up procedures

- ## How do these problems affect the migration?

  Many migration projects (up to 60%) fail in some way, so managing the risks associated with CRM migrations is important. Sometimes a range of problems affects the migration, other times there can be a single large issue, such as data quality. Either way, missing a problem and dealing with the consequences of its impact is always worse than identifying and managing problems at the outset. Which is why thorough preparation and understanding of the data being moved are crucial for avoiding migration failure.

- ## How can migration problems be avoided?

  In general, project teams containing strong CRM migration experience are best at navigating migration challenges and are more easily able to:

  a) Identify resource needs, tasks, critical path and milestones
  b) Operate within budgetary and resource constraints
  c) Manage typical problems such as changing formats and bad data
  d) Deal with data matching, data cleaning and data transformation

  Specialized migration tools are also useful. Not only do they reduce the chance of errors, their extensive functionality also makes it easier to manage any problems that do happen to occur.