

## How to Prepare for a CRM Migration: User Checklist

You've read our guide "How to Manage a CRM Migration", now here's our sample checklist to guide you through the typical steps involved in a successful CRM migration. InaPlex would be happy to provide you with a [custom checklist on request](#).

### Administrative Preparation

- Identify Data Owners
- Identify Data Pools to migrate
- Confirm Owner Buy-in
- Agree Project Owner(s)
- Confirm Project Funding
- Determine Deadlines
- Determine security levels and access
- Ensure backup/restore procedures

### Business Preparation

- Plot business data flows
- Identify client data requirements
- Confirm Sales Team needs; organization, territory and client detail requirements
- Confirm all data repositories to be moved
- Identify new data sources
- Confirm pick-list / drop-down structure in new system

### Data Migration Assessment

- Confirm source databases to be migrated
- Confirm data to be transferred
- Clarify data structure; company or contact-centric?
- Assess data quality; duplicates, inconsistencies, omissions
- Clarify data setup in new system
- Quantify data transfer load

### Data Integration Assessment

- Review data needs of new CRM system to determine integration requirements
- Review possible synergy between CRM integration and migration tools/approach

### Resources Review

- Are there sufficient internal resources for the CRM migration? If yes, costs?
- Are external Services required for all or part of the migration? If yes, budget?
- Is a tool required for migration?
- Is there synergy between a migration tool and an integration tool?
- Can migration be largely automated?
- Who will be responsible for internal testing? Is a team required?

### Migration Preparation

- Map fields between the old system and the new system
- Map pick-lists between the old system and the new system
- Screen for duplicates
- Clean data / manage data quality
- Setup queries/profiles/routines as appropriate
- Train users on new CRM system

### Migration Test Run

- Ensure backup availability
- Run test, check results, refine migration criteria, repeat
- Review and check audit trails

### Run Migration

- Ensure backup availability
- Reserve down-time window
- Run migration
- Check audit trails
- Check results
- Ensure trained personnel
- Have support to hand to aid and assist with new live system
- Cut-over to new system