



# **BEST PRACTICES IN CRM DATA MIGRATION**

**A Proven Framework for CRM Data Migration  
& Sugar Implementation**

For those who have never been involved in a large-scale CRM data migration project, there can be a misperception that data migration is a simple exercise of exporting data from one system and importing data into another system. However, data migrations can be extremely complex. Whether you are migrating from Salesforce.com to Sugar or from another contact management solution, you will likely come across a few challenges.

Migrating data almost always requires a deep understanding of the target system, along with very specific coding expertise. Mishandling this process adversely affects an entire CRM deployment. This white paper will outline a proven framework, along with many CRM data migration tips that both CRM customers and migration developers may find useful.

## The 3 Types of Upgrades:

There are typically three main types of CRM migrations, these include:

- 1. No existing CRM platform** - Some organizations may not be using a CRM system at all or are working from various Excel spreadsheets and have decided to make the leap to the world of organized customer relationship management. In this instance, the data conversion requirements are typically fairly simple.
- 2. Legacy CRM platform upgrade** - Companies using older CRM software like ACT or Siebel may desire to migrate to a more modern software such as Sugar. Also, companies that started out small may have used platforms like Nimble, ZOHO or Insightly and have simply outgrown them. In these migrations we look out for unusual data structures and formats, as the customer has often stretched and tweaked the capabilities of these systems over the years.
- 3. Modern CRM migration** - For various reasons, the company chose to switch from one modern CRM platform to a different platform, perhaps because the one they are currently using is too costly or lacks a specific functionality they desire. In these cases, data is usually in a common format, but will reflect the more complex data structures of modern CRM tools.

## Preparing for Migration:

The idea of purchasing a new application and starting fresh is exciting, it allows companies to course correct processes that are currently inefficient. When preparing to migrate CRM data from one platform to another, companies should first establish ownership, then take time to clean up their data. The next step -- completing the framework for CRM data migration can either be completed internally, or the recommended approach would be to have it done by a CRM data migration expert.

## Establishing Ownership:

One of the most overlooked things in terms of having a CRM system is designating an owner. This is critical to the success of an organization's CRM implementation and long-term use. However, before assigning someone this role, it's important to make them aware that they will become somewhat of a lightning rod for criticism and complaints for a time. It's a unique position that may come with some stress. However, in order to maintain good, consistent data, there must be someone monitoring the data and managing the system.

*"You're asking employees to change the way in which they do things. People don't like that natively. The owner of the CRM system has to walk a fine line between being a forceful hand and being someone that the users can depend on for information during the transition."*

**Marc Dicaire, CRM Consultant, W-Systems**

## Cleaning the Data:

Issues with the current data being duplicate or out of date can be solved by utilizing an external service provider such as Dun & Bradstreet to optimize the data by updating addresses and other company and employee information. However, budget-conscious companies may choose to verify data internally by extracting into Excel and reviewing manually.

The most up-to-date customer data can usually be found within an organization's ERP or accounting systems. The largest volumes of contact data will be in the CRM system. Unfortunately, contacts added into the CRM tool over time by sales and marketing teams are typically the most troublesome. An average database may hold thousands of companies and individuals that were once prospects, but the sale never closed. Before migrating data to a new CRM platform, it would be beneficial for sales and marketing teams to verify each record for accuracy. Depending on the number of records, this process can be extremely time-consuming, but can also go a long way in ensuring that the new CRM system is as clean and relevant as possible.

When cleaning the data, there are a few key steps to follow. First, come up with some duplicate rules. One common rule is that there should only be one email address per contact, assuming everyone has an email address within your records. For those that don't, it may be

necessary to come up with another rule, such as using first name, last name and phone number to identify duplicates. Ideally, multiple duplication checking strategies are employed.

Once the duplicate rules are identified, they should be applied by outlining what it would look like after the data is migrated and what duplications exist. It's important to remember that the rules are not going to be perfect unless the fields in question are always required and filled in correctly, 100% accuracy is difficult to achieve, and companies will often need to settle for 'close enough.'

## A Proven Framework for CRM Data Migration:

### I. Identify if conversion is from a single system or from multiple sources

Ideally, all data would originate from one source -- your current CRM system. Realistically, that's not always the case. Oftentimes, data sources are made up of legacy CRM systems, homegrown databases, Excel spreadsheets, ERP software, Outlook emails and other sources. Once you are in agreement on where data should come from, create an inventory including each data source.

### II. Develop a business understanding of what source data is utilized and for what purpose

One of the biggest challenges faced with migration is not fully understanding the business purpose of the data. The data conversion team should have a good sense of the use of the data so they can properly map the data into the new CRM functionalities. In addition, business processes may not have been ideally designed in the old CRM system. Use the opportunity to review whether the processes and data still make sense today. If your records are not populated correctly and the system is not easy to use, you get locked into the same issues your users faced with the previous system.

When going through this conversion process, take the time to apply some filters and perhaps you'll find that only the records updated within the last three years will do. Many customers create an attachment to their data because they have been collecting it for ages. They migrate it from platform to platform for years, without ever evaluating whether that data is still accurate and relevant to their business today.

Therefore, the first real effort in any migration is to ask yourself why am I doing it and how it will help my business process? Then determine if it's necessary to augment the data as it's imported or change some of the current procedures in the new system. Business decisions like this --made ahead of time -- go a long way in helping to define the scope of the data conversion.

*Often we'll hear, 'that's just the way it's done.' But that's not a real answer to any question and does not reflect understanding. There needs to be a documented reason why data is collected and what the process is around it."*

*Dennis Smith, VP of Sales, W-Systems*

### **III. Identify if there is data required beyond simple Organizations and Contact imports**

When considering data conversions, make sure you also consider related data. Most organizations wish to convert information about accounts and contacts, but the information stored can go way beyond names and addresses. Other types of data that may be included in a CRM migration are:

- Meeting history
- Call logs
- Notes
- Emails
- Email attachments
- Related documents

Make sure you review each of these data types with your stakeholders and determine if they need conversion. These related data types are often the most costly data to convert as the data structures and content may be more complex than core name and address data.

### **IV. Evaluate source data customizations**

If the source data is from a commercial product, it's important to investigate whether the customer has customized or configured the product with new data structures or are using standard features in non-standard ways. If so, figure out why the customizations were created. In many cases, they were built to house data from another application, without any productivity benefits in mind. After identifying what the use case and business function of the module is, if it makes sense and is going to survive, you'll need to build the same structure within your new CRM system to store it. However, an application expert can introduce best practices and recommendations for a different way to store and use the data within the new system.

Another task to take into account is identifying data sources in destinations. In some older CRM systems, the account information and contact information are one in the same record. When you're migrating data to a system like Sugar, these two records are separate. Therefore, the one record must be broken into two during the conversion. This and many other tricks are employed by CRM migration specialists in an effort to normalize the data as much as possible.

If customizations exist in the old CRM system, it's important to point this out to those performing the migration so that they are incorporated into the data conversion structure. Consultants may have standardized scripts and methods of doing things and will need to alter these methods to accommodate the customizations.

## V. **Determine the level of access available to the original or extracted source data**

Some consultants prefer for the customer to provide a standardized CSV file that holds all of their data so that they spend less time digging around your system trying to figure things out. In some situations, this may not be possible and the data may be provided in a source relational database such as MS SQL or MySQL.

*"CSV files are nice but generally what's missing from these files are metadata that describes how records are associated together. When we can get our hands on the actual database that gives us access to all of the underlying tables that maybe aren't accessible in a CSV export, that helps us build a clearer picture of how records are tied together."*

*Paul Candela, Director of Technology, W-Systems*

## VI. **Analyze source data organization and align to Sugar standard**

Once it's clear what data will be migrated, the next step is to plan the design of the Sugar system that will hold it. Often you will have much more design freedom in Sugar than was possible in the older CRM. Therefore, constraints that shaped the information in the old system do not have to constrain you going forward. Plan out which standard and custom Sugar modules will hold the data, and which relationships need to bind the data together.

## VII. Identify source records that will serve as test cases

In order to verify that all fields visible on the screen in the source system are also visible in the converted Sugar system, it's important to select a handful of source records to serve as test cases. You'll want to pick records that are complete, preferably ones that people use often. It should be an account record with more than a dozen contacts and all these contacts should ideally have calls, meetings, to-dos, documents and every other relevant field utilized. After the data is converted, look at the test case records side by side in the old and new system to verify that all information made it over into the right location.

## VIII. Perform record counts

When preparing for a data conversion, perform a count of each data type in the old CRM system. For instance, establish that there were 23,000 account records, 57,000 contacts records, 62,000 meeting notes, etc. After the conversion, review the counts of these same data types in the new CRM system and resolve any differences.

## IX. Identify common record identifiers

Record identifiers tie together related information in different tables. After the record count, in order to determine which records are missing, you'll want to rely on this unique identifier. For example, if you have three files -- an account list, contact list and call list. In each one of those files there is an ID that helps you to understand what calls are associated to what contacts and what contacts are associated to what accounts. Having a clear understanding of how the data is structured in the backend of the original system is needed to accurately reproduce it in Sugar.

## X. Map detail fields

The next step is field mapping. You'll take a table/field from the source data and define what table/field it will go into in Sugar. An average customer may have around 50 fields per module to map, while some larger organizations will have hundreds. After the map is agreed upon by the client and any necessary modifications are made, you have a clear guide to what data will be migrated and how to proceed.

Any data transformations needed should also be included in a mapping document. For instance, if a data field was in a certain date format, it may need to be converted into another date format to fit the target Sugar system.

## XI. Plan field transformation

The next step is probably the most technically difficult and important part of the transformation. If not done carefully, field transformations are the easiest places to make mistakes.

- A. **Date format transformations** - Discover how dates are handled in both the outgoing and incoming systems, as well as in geographic regions and cultures. Dates could be stored in UTC format or in local regional time zones. They may be entered as 2/15/16, 02/15/2016, February 15, 2016, 15/02/16 and so on. It's imperative to be aware of how they are being stored and to convert them into the appropriate format within the Sugar system.
- B. **Free text to Drop down transformations** - Using free text is less than ideal because people will enter things in a variety of different ways. For instance, the word 'Street' can also be referred to as 'St.' The advantages of drop-downs are that once you have structured, predictable information, reporting becomes a lot easier and data becomes more consistent.
- C. **Handle empty or null strings** - An empty string is a field that contains no value, while null is the absolute absence of value. Whenever data sources don't have values populated in certain fields, there's a need to populate them correctly and properly handle both the source and Sugar values for null and empty fields.
- D. **Handle text encapsulation and field separators** - Within a CSV file, there may be a row that has the name of a company, then the name of the street address, separated by a comma. This can be a problem if there are commas in the company name, for example, 'O'Reilly and Sons, Inc.' In this case, text encapsulation in the form of double quotes should be employed to ensure that there's one text field, even if there is a comma in the name of the company.
- E. **Handle HTML data** - Housed within CRM systems can be various text formats, including HTML, rich text, and plain text. If in your old CRM, things were entered in HTML format and they were transferred into the new system as text without proper care, you'd end up with messy HTML code in your text fields, making them very difficult to read. Instead, data should be converted to an appropriate format within the Sugar system.
- F. **Handle foreign character sets** - Foreign or usual characters can interrupt the conversion. There are many different ASCII standards, so it's important to be aware of what types of characters exist in the old system and if its characters are different from the news system, they should be converted.

## **XII. Test, test, test**

Plan on repeating the data conversion multiple times until the conversion is accepted by the customer and then performed a final time as the production conversion.

*"It's basically just rinse, wash, repeat. You write the script, run it, perform all the necessary tests and spot checks, find your errors, erase it, correct it and run it again. Do this until you get it right."*

*Damon Hurd, Consulting Practice Manager, W-Systems*

## **XIII. Document step by step tasks**

Decide on the steps needed to perform the conversion and document them for time and accuracy in follow-up tests, reducing the labor cost of repeated conversions.

## **XIV. Automate and script as many tasks as possible**

Scripts help to compress the human time needed for repeated conversions. Make sure to utilize SQL scripts and batch routines to automate whenever possible.

## **XV. Create an error handling process**

At some point during the conversion, the programmer may find a record that is corrupted or missed in some way. There needs to be a process for how this is handled. Perhaps the protocol is to record the location and a specific reason for the failure or to stop and try to solve the problem immediately. Either way, having a set routine will allow you to fix the few records where an error occurred, as opposed to redoing the entire record import.

## **Post-Migration – Things to Consider:**

After the migration, it's important to execute the test plan. Perform your record count checks, bring up your test records, review the error log, and perform the CRM uses cases with the new data. If there are issues, make a determination if it warrants another conversion pass or if the data can be corrected in place.

## The Advantages of Hiring a CRM Migration Specialist:

**Expertise** - Migrating CRM data can be a complex process that only companies with staff experienced in database programming should attempt. Otherwise, it will prove extremely difficult because of the amount of transformation and scripting that has to occur.

**Customization** - W-Systems offers [wCare](#), an entire library of custom modules and integrations, put together over time from doing countless imports for customers. We've already done the legwork of deploying Sugar to 100's of organizations within every industry, documenting it along the way. This library is used for transformations from specific data types, as well as to get around some of Sugar's common import challenges.

**Convenience** - Even companies with the experience necessary to pull off a CRM data migration often bring in experts simple due to the time commitment involved. Given their other responsibilities, internal projects would likely suffer and the migration could take longer than desired.

## Mistakes to Avoid:

**Never take anyone's word on the cleanliness of their data** - It's usually greatly exaggerated and many people are simply unaware of how many duplicates and out of date information they have.

**Don't underestimate the complexity of migrating CRM data** - For most, it's nowhere near as easy as exporting and importing a list of names, email addresses and phone numbers. The more custom fields and data types you have, the more complex the process becomes.

**Avoid taking the easy way out** - For example, it may be easy to import everything as a text field, however, text fields are one of the least effective ways to capture information inside of a CRM system. Multi-select or drop-down fields will yield much better results, but take more time to implement.

Overall, the biggest mistake would be not following the framework laid out above. This would result in a less than ideal migration, with incomplete data, inefficient processes and users less likely to adopt the new system.

*"Skipping any of these steps would be a huge mistake. A big risk is if you make a mistake that isn't discovered during the launch. Once people start to use it, mistakes become very hard to recover from. It's very time consuming to try to repair a piece of data in an active system. Not following a comprehensive migration routine results in delays in project time, increased labor costs and customer dissatisfaction."*

**Christian Wettre, President, W-Systems**



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