# White Paper

**Prepared for:** General Audience

**Purpose:** Approaching Migration between Dissimilar CRM Systems

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## Introduction

We have extensive experience migrating data between different CRM systems. This document is provided to help you understand what is involved when migrating, as it is a key part of the recipe for a successful implementation. Other parts of the recipe (not included in this document) are understanding business needs of the customer, helping design an easy-to-use system which meets those needs, customization, proper phasing of the implementation, and end-user and admin training. These are all critical, but the data migration causes the most head-scratching and confusion, hence the creation of this document.

## About Relationship Automation

Relationship Automation ("RA") is a consulting company specializing in implementing and supporting customer relationship management ("CRM") systems including GoldMine and Salesforce. We design and develop integrations between disparate databases including Microsoft SQL Server, MySQL and hosted and premised based CRM, accounting, billing, email marketing and reporting systems.

We also identify business needs and work with both non-technical users and technical staff to achieve desired results within a universe of very disparate systems and IT architecture. This requires understanding the big picture, reducing it to a process, and creating the technical solutions. Equally important is dealing with the human side -- communicating with both tech-savvy IT people and coaching non-technical sales and operational team members.

RA has implemented systems for web-based lead capture and process automation for website leads to provide for prompt response to inquiries and automated follow-up.

We are keenly aware of the need for system security in all phases of business operations involving IT components. We understand security concepts and directly implement within application; within OS under Windows, Linux and Android; at router/firewall level and through VPN.

RA additionally has implemented remote and mobile solutions for smartphone, tablet, and notebook users connecting to large corporate database servers.

More information about our services can be found here:

http://relationshipautomation.com/consultingservic.html

**<u>Similar Features, Dissimilar Structures</u>**

Data stored in different CRM systems is structured differently. Tables, columns and the relationships between them differ. Migrating data between them requires understanding both structures, mapping how data will move and creating the code to move and restructure the data.

Understanding the source data and its structure is relatively straightforward – look at how the current system is used, look at the tables, ask questions and document.

For the receiving system, there are more steps. The receiving system will have similar (but different) functionality and must be configured to meet the business needs of the customer which helps determine the structures before data mapping can be done. The steps for the receiving system are: asking questions to understand the needs of the customer, design and implement customizations, understand how these are reflected in back-end structures, then document.

At this point, it should be possible to give a rough costing for each part of the project to the customer for their approval. For example, to migrate Accounts and Contacts, we estimate 8 hours and for Historical Tasks, we estimate 2 hours, and so on.

For each item we can show the proposed mapping. It's normal here for the customer to decide that some data may not be worth migrating or, if a small number of records, may be migrated at lower cost by retyping. More about this in the Expert Tips section at the end.

Before any code is written or the migration started in earnest, it is strongly advised to make a mock-up in the destination system. The mock-up can be rough (i.e., not cosmetically perfect), but it should show how each type of data will be represented in the receiving system. This requires performing customizations in the receiving system and typing or copy-pasting data between the two systems. The end-result is that the customer can actually see how a (very small subset) of their data will look in the new system. If something has been overlooked or misunderstood, this is the least costly way to discover that and remedy it.

Sometimes, there are two or more ways to accomplish something in the destination system with trade-offs for each approach. The mock-up is a great way to demo different approaches and help the customer better understand the options.

Finally, time/cost spent customizing the mock-up can often be applied to the actual migration project. i.e. For the live system, we'd start with the rough mock-up and make it polished.

**<u>Expert Tips, Other things to keep in mind, and things oversimplified in the above</u>**

**1. Data Cleanup.** As part of the new system and migration project we often confront data issues with the source system. Such data issues include duplicate records, records with missing data, old/junk data, etc. While beyond the scope of this overview document, it is important to have a plan on how to deal with these problems. As the old saying goes "garbage-in, garbage-out". The most efficient way to deal with these issues is often a combination of using features in the source system, cleanup by our code in the migration process and/or using features in the receiving system after the data has been migrated.

**1b. Pick-list choices** are often changed when migrating between systems. These are changed for both a combination of cleanup of old/bad data as well as streamlining the new system to make improvements.

**2. Number of records vs. Migration cost.** For costing, the number of records migrated does not really matter. The time in these projects is the analysis, design, discussions, documenting and yes, coding. Since it's the code doing the migrating, it doesn't much matter if we are moving 2,000 records or 200,000 records.

There is an exception to this: very small number of records. If some portion of the source system has been very lightly used, i.e. there are only 40 future tasks or 40 opportunities, it is often less costly to retype these in the destination system than migrate them with code. For those who like to see the bright side, beside a lower cost, this can provide practice in using the new system.

**3. Historical E-mail migration.** Migrating historical e-mails has special considerations and adds complexity. The nature of e-mails (large blobs of formatted text, attached files) and differences of internal structures depending on the email sender's client configuration all provide extra challenges in migration. Maintaining proper email formatting and extracting linked files are tricky and usually require some concessions to the near-perfection we ordinarily strive to achieve.

**4. The easiest (lowest cost) migrations**. The lowest cost migration, which needs very little of each of the above steps occurs when the originating system has hardly been used. We see this when customers tell us "We only use the (old) system as a Rolodex. Any tasks or opportunities aren't important to migrate."

**5. The devil in the details.** We've all heard about systems which weren't perfectly right on go-live day and that the affected customers had to work through issues and fixes over the following days (or sometimes weeks).

Writing as someone who was recently brought in to fix the migration mistakes of other consultants, I'll say that a strict attention to detail throughout the whole process including testing with the customer prior to go-live should preclude all but a minor hiccup or two. This is mostly a result of good process but it also benefits from the kind of personalities that sweat details.

**6. Lead-times.** For those wanting to migrate from their current subscription-based CRM, the renewal date on the current system represents a hard deadline. We strongly recommend you begin **at least** two months prior to the deadline and preferably sooner. This gives you one month to make a decision on the new CRM and one month to plan and execute the new system. For more complex systems and companies having a committee making decisions, more time is often needed.

**7. Non-billable courtesy for undecided customers.** As you can now understand, to give a proper plan and costing requires a commitment of time from both the customer and the consultants (us). Our business is selling our expertise and experience, so this process is billable. For a customer who has already decided on the new system, this makes perfect sense.

For the customer who is still deciding among different choices, it's not ideal. For these sites, what we'll often do is provide a gratis examination of the source (old) system, have an initial conversation on needs and make some recommendations on how to proceed, any anticipated issues and (very) ballpark costs.

For those who need assistance choosing which CRM system is best for them, we are sometimes hired to gather and prioritize needs, evaluate multiple systems against those needs and make recommendations on which deserve a closer look.