StarfishETL

WHITE PAPER

CRM-to-CRM Data Migration FAQ's

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Purpose

This whitepaper describes some of the most frequently asked questions regarding a CRM-to-CRM data migration. These explanations will help you:

- Better understand the migration process
- Anticipate the risks and hidden costs
- Understand how & when to leverage a skilled migration team
- Understand the success criteria & best practices for a CRM data migration

Q: We have not migrated data with an external partner before. What is the process?

A: A migration project has an implementation process just like any other project. And if you are not familiar with the migration process, it certainly is beneficial to bring in a Migration Partner. Your Migration Partner should provide you with a topical list of what to expect as your project progresses. But because every business's data, processes, and technical environment are different, not every question or answer is known at project startup. So Project Managers are assigned both by you and your partner. Both Project Managers work together to coordinate communications, prioritize and schedule resources, ensure issue resolution and escalation if needed, and keep a close eye on the deliverables and budget to make sure your migration project is completed as expected. These are a few examples of discussions that your Migration Partner would coordinate and lead:

- Project Kickoff including process review, high level scope review, and resource needs
- Scheduling and Daily Scrum meetings
- Design planning for clarification of mappings and data values
- Review of issues once the trial migration has started
- Go-live planning and coordination
- Resource coordination after production migration, if needed

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Q: What resources do I need to make sure the project goes smoothly? What if some are not available?

A: From a Best Practice perspective, the resources listed below are critical for a smooth implementation. At times, you can struggle along without one or more of them, but the implementation will take more time, be more costly, and have questionable success.

- Committed management team/stakeholders to support the team and make high level decisions
- Project Manager to coordinate/prioritize your internal resources, communicate to your user base, and escalate issues as required
- A Business user from each affected department who is willing to make time to participate, especially to share business knowledge and perform User Acceptance Testing
- CRM Admin and Developer for your source system
- DBA who knows your databases, how they are integrated, and how they are setup and managed
- IT/Networking resource
- CRM System Designer for your destination system

Q: Can my Migration Team put multiple resources on the project to speed development?

A: Your Migration Team will likely do their best to deliver as quickly as reasonably possible. However, because of the hierarchical nature of the data, there is a critical path that must be followed. Also, to paraphrase from Fred Brooks, while it takes one woman nine months to make one baby, nine women can't make a baby in one month. Any resource who is building jobs/queries for your migration needs to understand your 'big picture' and business processes surrounding the jobs. So the Migration Team PM needs to balance the available funding against the inherent overhead associated with getting multiple resources up to speed and coordinating their work.

Q: Why does our destination CRM team need to be involved in the migration? We need them for other tasks.

A: The destination CRM team will have intimate knowledge of any workflows, triggers, and plugins that exist in the destination system, in particular which ones will be activated when the migrating data is loaded. These must be turned off to prevent the Migration Tool from timing out (waiting for them to complete processing for each record migrated), and to have the migration jobs run in the fastest amount of time.

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Q: What information should I gather before I meet with an external Migration Partner to begin my migration?

A: There are several types of information that an external Migration Partner will ask for. The resources on your internal migration team should assist you in providing the following:

- If your CRMs are on-premises, a means to access your servers, i.e. Remote DeskTop Connect, Teamviewer, LogMeIn, etc.
- Source system access credentials for both Test (to begin) and Production (prior to go live), including VPN information if appropriate
- Source application access credentials that have been confirmed/validated
- Destination system access credentials for both Test (to begin) and Production (prior to go-live), including VPN information if appropriate
- Destination application access credentials that have been confirmed/validated
- Server information to install your chosen migration tool, including permission to install apps
- Source to destination field by field mapping documentation
- Because activities differ by CRM, a clear definition of "activities", i.e. calls, meetings, emails, tasks, etc., and the ways to identify each of them properly (ex.: history transaction type)
- Clear definition of project scope or statement of work
- Contact information for all key project team members
- Business timeframes that are sensitive to migration activities and should be avoided if possible

Q: My CRMs are on-premises and I provided my external Migration Partner with server logon information, why do they still need IT help?

A: Your external Migration Partner will need access to more than a server. It's necessary to ensure the VPN and logon information you provide has been properly setup by your IT department and by the CRM Admin for both the source and destination CRM systems. It's most helpful when you can confirm access to ensure the credentials function correctly before passing them along to your external Migration Partner. It is also useful for an IT representative to be available in case your external Migration Partner has any access/logon issues or security/software conflicts.

Q: Why does the external Migration Partner need local Admin rights to the Migration Tool server and database Admin rights to the database server?

A: When your CRMs are on-premises, having Admin rights allows your external Migration Partner to create stored procedures and temporary tables, reset the web server if necessary, and perform other data analysis during the migration.

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Q: How do I decide if I should clean up my data before or after I migrate it? Why can't the migration tool just do it?

A: Regardless of the before or after question, the most important fact regarding data is that data must be relatively clean for a migration to be successful. The choice of cleaning up the data before or after is really based upon the availability of data cleaning options of your CRM systems and the condition of your data. Sometimes it's better to clean the data before and other times it's easier to use the tools of the new system. The only issues you need to clean up prior to migrating your data are those related to maintaining data integrity or data linkages. You must ensure that data links are valid, and when a linkage is expected, that it exists. Normally this will show up as issues during the data migration, and if data integrity does not exist, then the data will never migrate correctly without manual assistance.

There are 3 main reasons why the Migration Tool should not be used for extensive data cleansing:

1. The migration tool will provide data to the destination system as it exists in the source system, unless it's instructed to transform the data. In order to create these instructions, the client must provide the business rules to transform the data and the Migration Team needs to code the rules into the map. This is significantly more expensive than simply cleaning the data in the source or destination system.
2. The tools in your source or destination systems are typically robust enough and much better at easily cleansing your data.
3. Sometimes it takes the human eye/knowledge to determine which data is most accurate. A Migration Tool is not capable of this aspect.

Q: For items we don't know how to map, can you give us recommendations?

A: Yes, through a separate requirements discussion defined above, your Migration Partner can gather information and help you decide how data is to be mapped. Your CRM System Designer or CRM Business Partner should be involved in this discussion since they are most familiar with your business processes.

Q: Why is there a need for so much mapping when a base map already exists?

A: First let's look at the four ways data will map:

1. One to One, which is a source field moving to a destination field. Transformation of data may be required.
2. One to Many, which is when a source field breaks apart to become multiple fields in the target system. This is because of the way information is stored. For example, in Goldmine, Notes are stored in one field on a record, and in most other systems Notes are separate record entries.

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3. Many to One, which is when multiple source fields are transformed into one target field.
4. Many to Many, which is when a set of information becomes a reorganized set in the destination. For example some systems allow a user's defined field to contain any value and multiple fields might have to be combined into one, or broken apart based on other information.

These 4 types of mapping can happen to a data item or an entire record of data. Here are some examples relating to real situations:

1. One to One: It's very common to have picklist values in the source be mapped to new values in the destination system so that data can be standardized. Sometimes bad/old values are identified and dropped altogether. Other times they're consolidated into a new value. Special logic must be built to handle these various transformations.
2. One to One or One to Many: The standard field in the source system may not have been able to handle the nature of the data users provided, so data is input in a different custom field as text. A common example is "Company Revenue" stored as words or ranges of values. Transforming this data to the correct standard numeric format in the destination system is usually complex, requiring additional logic to be built.
3. One to Many: Sometimes the data in the source system is not being mapped to a similar table in the destination system because the data structures have been redesigned in the destination system. In such cases a single field value may need to be mapped to multiple fields or even multiple records. Such transformations require additional logic to be built.
4. Many to One: Occasionally, relationships between entities will be customized in the source system, or may vary from source to destination system for other reasons. These differences must be reviewed and accommodated in the Migration Tool mappings. For example, Contacts could be many to many in your source and one to many in your destination.
5. Many to Many: A common occurrence is that fields in the source system have been repurposed over time. Such misuse of fields can result in multiple unrelated values being stored in several different fields. This can cause additional complexity in separating various values for transformation to the destination system.

Q: What happens when we have field type mismatches or data integrity issues between our source and destination systems? Why will the Migration Tool skip the entire record if one field value is bad?

A: If the destination database or API finds data that is 'bad', that it does not know how to process, the Migration Tool will skip over the entire record. This isn't a function of your Migration Tool but a typical database or API safeguard so partial data isn't loaded to your system, and so the full record can be correctly processed at a later time when the 'bad' parts have been corrected. This helps ensure 'bad' or incomplete data is not introduced to your destination production system.

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Q: How can we see what the mapping looks like? Is there a way to export the map file to excel?

A: Your Migration Tool should have functionality to provide a method to review the mappings. Perhaps a report can be viewed within the tool, or an Excel file is provided for export. The exported file may require that you understand basic scripting to read some of the formulas used. Check your Migration Tool documentation.

Q: What should I plan for and expect when it comes to validating the migrated data?

A: Most clients create a test plan of common business scenarios/use cases to process during User Acceptance Testing, checking the data each step along the way. They also include a straightforward review of each data field for key or well-known customer records, matching back to the source data but also taking into account the various data transformation that have been applied. They may include their IT folks to obtain counts of appropriate records in both the source and destination systems for comparison.

There are several reasons why you would not delegate the testing task to your Migration Team:

- Testing resources must be both business savvy and technically astute to understand when data is/is not 'right' and how to navigate to data in both the source and destination systems so they can compare data
- Your testing resources must have knowledge of destination business processes that may transform data for display purposes after it is loaded. The data may have been migrated properly but will 'appear' different, or not at all, because of internalized business processes that your Migration Team is not aware of.

Q: Why is the actual migration of data taking so long?

A: There are 2 main areas to look at when analyzing migration timings. These should be reviewed and discussed prior to your Trial migration. Your Trial migration will provide a good indication of how long your final migration will take.

First is the hardware/software/network configuration, including:

- The speed of the network and servers involved, and contention with other processing software
- The locations of the source db, destination db, and migration tool, and whether they are in the cloud or on premises or a combination
- The existence of data dependent workflows, triggers and plugins on the destination system that can add significant time to each record processed
- The ability of the destination system to accept multi-thread data inputs

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Second is the data itself, and related processes, including:

- The cleanliness of the data and thus how many errors are generated during processing
- The volume of data to migrate
- The number of migrations jobs required to migrate all of your data
- The amount of data transformations required during migration

Q: Can we make our own changes to the map with the Migration Tool?

A: What may seem like a minor tweak must be reviewed in the context of all data being migrated, along with any destination system workflows and triggers. It could be a minor tweak, or it could lead to a bigger change in the mapping affecting other entity data. Unless you are knowledgeable in the use of your Migration Tool, you risk corrupting your data by tweaking the map. It is best to leave configuration and customizations changes for your Migration Team.

Q: When we go live, you will be validating data to confirm that all the data imported correctly, right?

A: Even with the best planning, you will typically encounter some errors during migration caused by a variety of sources such as data problems caused by not keeping up with the latest CRM system upgrades, corruption caused by a previous migration, or data problems caused by other system integrations, to name just a few. Depending on data complexity, this could range from 5% up to 30% of the data records having an issue. If your testing is thorough, you can dramatically reduce this risk to the lower end. Typically, your Migration Team will perform limited testing at go-live to ensure the migration jobs ran as expected and that mapping occurred as defined. However, your Migration Team is not nearly as familiar with your data and how your business users expect to see it as are your key users and test team members. These folks would follow the same validation processes utilized during User Acceptance Testing. These are the folks who will know that account ABC should have had contacts of Type=Y rather than Type=Z associated to them. This is why it is so important to build your internal migration team with the 'folks in the know'!

Q: Since we don't have enough time, we plan to do just a little testing and then go live. It should be possible to fix data after we go live, correct?

A: In many instances, small tweaks can be made to data after go live. However, for large clean-up efforts and realignment of record relationships, it could be four times more costly than migrating it correctly the first time when you also consider additional planning, changes in data dependencies in the destination, additional data complexities, and coordination with the user community. Post-go-live fixing also adds a huge amount of risk to user acceptance because of the inconvenience to users and the downtime needed to keep fixing data after it is live. There is also the potential of overwriting new/updated user data because your users can be updating records that need fixing. Therefore, it is best practice to test more thoroughly and apply changes to correct the data mapping before go live.