SUMATOSOFT

Data Migration Checklist

For Enterprises

How to use (60 seconds)

Use this checklist as a control tool, not as documentation.
Go through it before migration starts and confirm ownership, scope, and rules. During migration, mark each step as completed only after business users validate the result. After go-live, use the last sections to lock CRM as the single source of truth and prevent rollback to old systems.
Use checkboxes (■/□) to track status.

If a step cannot be confirmed, stop the migration and fix the issue before moving forward.

Data migration checklist (enterprise CRM)

1. Scope and ownership

□ List all data sources (CRM, ERP, ticketing, spreadsheets, databases).
□ Assign a business owner for each dataset.
□ Define which data must be in CRM on day one.
□ Mark data that can remain archived or external.

2. Data relevance

□ Remove fields that do not affect decisions.
□ Identify mandatory fields for CRM workflows.
□ Decide which historical records are needed for daily work.
□ Set a clear cut-off date for deep history.

3. Data quality rules

□ Define deduplication rules before migration.
□ Agree on conflict resolution logic (source priority).
□ Normalize formats (names, phones, currencies, dates).
□ Validate reference data (statuses, stages, categories).

4. Mapping and transformation

□ Map each source field to CRM fields.
□ Document transformations and calculated values.
□ Flag fields that require manual review.
□ Lock mappings before execution.

5. Security and access

□ Map record ownership and visibility rules.
□ Validate role-based access after migration.
□ Ensure sensitive fields are protected.
□ Audit who can view and edit migrated data.

6. Migration execution

□ Migrate high-value datasets first.
□ Keep migration batches small and controlled.
□ Log every migration run.
□ Make source systems read-only when a dataset goes live.

7. Validation with users

□ Review migrated data with real users.
□ Check real scenarios, not random records.
□ Compare CRM data against source systems.
□ Fix issues before moving to the next batch.

8. Continuity control

□ Define where users work during migration.
□ Prevent parallel data entry.
□ Communicate cutover timing clearly.
□ Provide a fallback view to legacy data if needed.

9. Post-migration checks

□ Verify reports and dashboards.
□ Validate integrations and downstream systems.
□ Monitor data corrections during the first weeks.
□ Lock old systems after stabilization.

10. Finalization

□ Confirm CRM as the single source of truth.
□ Archive legacy data securely.
□ Document data ownership going forward.
□ Schedule periodic data quality reviews.

SUMATOSOFT

Thank you for your time!

Any questions? Drop us a line!

Headquarters

One Boston Place, Suite 2602
Boston, MA 02108, United States

Other ways to get in touch

info@sumatosoft.com
sumatosoft.com