

SoftwareGlimpse CRM Data Migration Template

Updated: 15 Aug 2026

Project / CRM: _____
Owner / Team: _____
Date: _____

Inventory CRM objects, volumes, owners, and load order.

HOW TO USE THIS RESOURCE

- 1 List objects
- 2 Estimate volumes
- 3 Assign owners
- 4 Set load order
- 5 Sign off

Key: ☐ Pass ☐ Partial ☐ Fail ☐ Not tested | * = Must-have

Evidence: screenshots, recordings, official docs, written confirmation, or test results.

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
1. SOURCE SYSTEMS						
1.1	Every candidate source listed	The source you forget is the spreadsheet someone keeps using after go-live.	*		○ Pass ○ Fail	○ Partial ○ N/T
1.2	Primary source named per object	Two systems claiming the same open deals guarantees duplicates.	*		○ Pass ○ Fail	○ Partial ○ N/T
1.3	Export method and access recorded	Nobody should discover during cutover that an export needs vendor support.	*		○ Pass ○ Fail	○ Partial ○ N/T
1.4	Excluded sources written down with a reason	Silent exclusions get re-litigated in the middle of cutover week.	-		○ Pass ○ Fail	○ Partial ○ N/T
2. OBJECT INVENTORY						
2.1	Accounts / companies row filled	Accounts are the parent nearly every other object hangs from.	*		○ Pass ○ Fail	○ Partial ○ N/T
2.2	Contacts row filled with a match key	Contacts are where duplicates bite hardest, and the key decides the outcome.	*		○ Pass ○ Fail	○ Partial ○ N/T
2.3	Deals / opportunities row split open vs closed	Open pipeline is the object the business notices immediately if it is wrong.	*		○ Pass ○ Fail	○ Partial ○ N/T
2.4	Activities row decided (include, exclude, later wave)	Activity history is usually the largest object and the easiest to underestimate.	*		○ Pass ○ Fail	○ Partial ○ N/T
2.5	Leads row decided (import, convert, or exclude)	Leads left undecided reappear as duplicate contacts.	*		○ Pass ○ Fail	○ Partial ○ N/T
2.6	Users / owners row filled	Owner remapping fails when seats do not exist before owned records land.	*		○ Pass ○ Fail	○ Partial ○ N/T
2.7	Custom objects listed or deferred	Custom objects rarely earn a wave-one slot, and they load after their parents.	-		○ Pass ○ Fail	○ Partial ○ N/T
2.8	Files and attachments decided	Attachment volume is what turns a planned weekend into a week.	-		○ Pass ○ Fail	○ Partial ○ N/T
3. VOLUMES, OPEN VS ARCHIVE						
3.1	Open vs archive rule written per object	Cleaning everything stalls migrations; cleaning the operating set is achievable.	*		○ Pass ○ Fail	○ Partial ○ N/T

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3.2	Record counts filled for every included object	Order-of-magnitude counts are what make load windows and cleanup effort plannable.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.3	Objects whose volume moves are flagged for re-count	A count taken months before the move misleads everyone planning against it.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.4	Sensitive objects and fields flagged	An extracted contact list is the highest-risk artifact the project creates.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.5	Known exceptions recorded	Legal holds and regional splits cannot live in a chat thread.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. OWNERS & ACCOUNTABILITY						
4.1	Business owner named per object	Quality decisions need someone whose team lives with the result.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	Technical owner named per object	Exports and loads need a named pair of hands and a backup.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Cleansing responsibility agreed before mapping	Cleanup with no owner slides to "after go-live" and never happens.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	Tie-breaker named for contested records	Two owners disagreeing over one account can stall the whole load.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. DEPENDENCIES & LOAD ORDER						
5.1	Parent-child relationships listed	Children loaded before their parents arrive as orphans.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Users placed above owned records	Deals landing on missing users is the most common load defect.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Load order numbered without conflicts	An order that only exists in someone's head cannot be reviewed.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Legacy key strategy recorded	Without a stable key you cannot reconnect children to parents or reconcile afterwards.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.5	Parallel-safe objects marked	Loading in parallel saves hours only where no link depends on the other object.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.6	Order reviewed with a frontline lead	The sequence has to match how the team actually works deals.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6. SIGN-OFF & HANDOFF						
6.1	Inventory version dated	Mapping and load work must cite one version of the scope.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.2	Field-level work handed to the field map	Stage, amount, close-date, and owner rules belong in one dictionary, not two.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.3	Cutover gates handed to the migration checklist	Dry runs, freeze windows, validation, and rollback are gate work — not inventory work.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.4	Scope changes go through change control	Silent scope edits after mapping starts are how orphaned records appear.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.5	Extract handling reviewed with security	Export files are contact and deal lists sitting outside the CRM.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T

Completion guidance

Pass = done with evidence. Partial = in progress.
Fail = blocked. Not tested = deferred on purpose.

Evidence matters

Note owners, dates, and proof in Evidence / Notes so handoffs stay clear.

Work top to bottom

Finish must-have (*) rows before nice-to-haves.
Do not invent a Pass without proof.