

CRM Field Mapping Template

Map source CRM data to your target system before migration.

MAPPING WORKBOOK · Not a Pass/Fail checklist · Updated 15 Aug 2026 · Excel is the primary working file

Source CRM:

Target CRM:

Migration owner:

Business owner:

Implementation partner:

Migration date:

Last updated:

MAPPING FLOW



SUMMARY COUNTERS (FILL FROM EXCEL — LEAVE BLANK UNTIL THEN)

OBJECTS MAPPED

FIELDS MAPPED

TRANSFORMATIONS

UNMAPPED REQUIRED

OPEN ISSUES

MAPPING READINESS

Mapping readiness (circle one when Excel is complete): NOT READY · AT RISK · TEST READY · PRODUCTION READY

Do not invent readiness scores or percentages. Leave summary counters blank until your workbook is filled. E HubSpot teaching) — not SoftwareGlimpse research.

01

How to use

Work top-down. Freeze object scope before deep field mapping. Do not invent Pass results without sample evidence.

- 1

Inventory source objects
List objects, approximate volumes, owners, and whether each is in scope for this wave.
- 2

Map target objects
Decide Full / Partial / Do not migrate / Excluded for each source object.
- 3

Map fields
Source field != target field with type, mapping type, required flag, and owner.
- 4

Define transformations
Document transforms, value maps, lookups, defaults, and do-not-migrate rules.
- 5

Validate sample records
Run sample source values through rules; confirm expected target outputs.
- 6

Sign off mapping
Business, CRM, migration, and data owners approve before pilot import.

BEFORE YOU BEGIN — REQUIRED INPUTS

- ☐ Source object inventory (export or API catalogue)
- ☐ Target CRM required fields (admin / import docs)
- ☐ Sample export rows for each in-scope object
- ☐ Owner directory for user lookups
- ☐ Picklist / stage / status value lists (source and target)
- ☐ Named migration owner and freeze date

WARNING

Do not start bulk migration testing until all required target fields have an approved mapping or explicit remediation decision.

02

Object mapping

EXAMPLE / ILLUSTRATIVE — Pipedrive! HubSpot teaching scenario (not SoftwareGlimpse research)

Map each source object to a target object and migration scope. Leave Approx. Records and Owner blank until you have real counts.

SOURCE OBJECT	TARGET OBJECT	MIGRATION SCOPE	APPROX. RECORDS	OWNER	STATUS	NOTES
Person	Contact	Full	_____	_____	Mapped	EXAMPLE — primary people object
Organization	Company	Full	_____	_____	Mapped	EXAMPLE — company match on name/domain
Deal	Deal	Full	_____	_____	Mapped	EXAMPLE — open + closed pipeline
Activity	Activity	Full	_____	_____	Needs decision	EXAMPLE — wave-one vs archive
Legacy Note	—	Do not migrate / Excluded	_____	_____	Excluded	EXAMPLE — free-text noise; exclude

Blank rows for your project:

OBJECT SUMMARY (BLANK COUNTS — FILL FROM YOUR SHEET)

MAPPED

NEEDS DECISION

EXCLUDED

BLOCKED

EXAMPLE rows teach the pattern. Replace scopes, statuses, and notes with your source!target decisions. New

03

Field mapping matrix

EXAMPLE / ILLUSTRATIVE rows — Pipedrive !' HubSpot teaching (replace with your fields)

SRC OBJ	SRC FIELD	TYPE	! ' T G T O B T	T G T O B T FIELD	TYPE	MAP TYPE	TRANSFORMATION	REQ?	OWNER	STATUS
Person	email	text	Contact	email	email	Direct	trim + lowercase	Y	_____	EXAMPLE
Person	name	text	Contact	firstname / lastname	text	Transform	split on first space	Y	_____	EXAMPLE
Org	address	text	Company	address	text	Rename	same value; field rename	N	_____	EXAMPLE
Deal	status	enum	Deal	dealstage	enum	Value Mapping	see picklist sheet	Y	_____	EXAMPLE
Deal	owner_id	id	Deal	hubspot_owner_id	id	Lookup	user_email !' owner	Y	_____	EXAMPLE
Deal	value	num	Deal	amount	num	Transform	parse; strip currency	Y	_____	EXAMPLE
Person	ssn_like	text	—	—	—	Do not migrate	exclude; security	N	_____	EXAMPLE
Activity	subject	text	Activity	hs_task_subject	text	Direct	trim	N	_____	EXAMPLE

MAPPING TYPE LEGEND

Direct

Rename

Transform

Value Mapping

Lookup

Do not migrate

Default

Blank + fill in CRM

Core sheet: replace EXAMPLE rows with your dictionary. Owner and Status stay blank until assigned. Required (Req?) must be set for every target field needed on day one.

04

Value & picklist mapping

EXAMPLE / ILLUSTRATIVE — teach value maps; replace with your picklists

LEAD_STATUS (EXAMPLE)

SOURCE VALUE	TARGET VALUE	ACTION	OWNER	NOTES
New	New	Map	_____	EXAMPLE — 1:1
Working	In Progress	Map	_____	EXAMPLE — rename
Qualified	Qualified	Map	_____	EXAMPLE — 1:1
Unqualified	Unqualified	Map	_____	EXAMPLE — 1:1
(blank)	New	Default?	_____	EXAMPLE — confirm with marketing

CUSTOMER_TIER (EXAMPLE)

SOURCE VALUE	TARGET VALUE	ACTION	OWNER	NOTES
Enterprise	Enterprise	Map	_____	EXAMPLE
Mid-Market	Mid-Market	Map	_____	EXAMPLE
SMB	SMB	Map	_____	EXAMPLE
Legacy Gold	Enterprise	Map	_____	EXAMPLE — consolidate
Unknown	Other	Map / review	_____	EXAMPLE — unknown handling

UNKNOWN VALUE HANDLING

Choose how unmapped source values are treated during import. Tick one primary policy; note exceptions.

- ☐ Reject row (fail import for that record)
- ☐ Apply approved default value: _____
- ☐ Send to remediation queue / holding list
- ☐ Map to Other / Unspecified
- ☐ Flag for manual review before load

Policy notes / exceptions (field-specific overrides, fail thresholds, owners):

05

Transforms & data quality

EXAMPLE rules TR-001..TR-004 — illustrative only; rewrite for your stack

ID	FIELD(S)	RULE	SAMPLE IN ' OUT	OWNER
TR-001	phone	EXAMPLE — E.164 normalize; drop non-digits; fail if < 8 digits after clean	+ 1 (4 1 5) 5 5 5 - 0 1 9 9 ! ' + 1 4 1 5 5 5 0 1 9 9	
TR-002	country	EXAMPLE — ISO-2 map (United States! US); Unlisted email address		
TR-003	revenue / amount	EXAMPLE — parse number; strip \$, commas; blank open deals need fill-in rule	\$ 1 2 , 5 0 0 ! ' 1 2 5 0 0	
TR-004	full name	EXAMPLE — split on first space ! ' firstnameP/atalsea/m/atb alnde last ! ' review		

Add your transform IDs below:

DATA QUALITY NOTES

Capture quality gates that block pilot: duplicate emails, ownerless open deals, invalid dates, unmapped stages, currency symbols, orphan account links...

Fail thresholds (fill when known): % · Quarantine owner:

Transforms are config. Every required target field needs a written rule, approved default, or explicit blank-with-owner — never hope.

06

Validation & readiness

Fill metrics only after sample validation. Leave blanks — do not invent percentages or readiness scores.

VALIDATION METRICS (BLANK FILL-INS)

SAMPLE RECORDS TESTED

FIELDS VALIDATED

TRANSFORM PASS RATE

REQUIRED FIELDS COVERED

UNMAPPED REQUIRED REMAINING

OPEN DEFECTS

READINESS STATES

NOT READY

Required maps incomplete or untested

AT RISK

Gaps remain; pilot blocked until remediated

TEST READY

Required maps approved for pilot import

PRODUCTION READY

Pilot passed; freeze signed for cutover

VALIDATION CHECKS

CHECK	OWNER	STATUS
Required target fields have approved mapping or remediation		☐ Open ☐ Pass ☐ Fail ☐ N/A
Stage / status value map complete (no silent invent)		☐ Open ☐ Pass ☐ Fail ☐ N/A
Owner lookup tested on sample users		☐ Open ☐ Pass ☐ Fail ☐ N/A
Date / amount transforms validated on sample rows		☐ Open ☐ Pass ☐ Fail ☐ N/A
Do-not-migrate fields confirmed excluded		☐ Open ☐ Pass ☐ Fail ☐ N/A
Sample expected outputs match target preview		☐ Open ☐ Pass ☐ Fail ☐ N/A
Cross-object links (account / contact / deal) verified		☐ Open ☐ Pass ☐ Fail ☐ N/A
Freeze version ID assigned for pilot		☐ Open ☐ Pass ☐ Fail ☐ N/A

Status key: Open / Pass / Fail / N/A — mark blank until evidenced. Do not use invented Pass rates as readiness truth.

07

Decisions, issues & sign-off

DECISION / ISSUE LOG

ID	TYPE	DESCRIPTION	DECISION / ACTION	OWNER	STATUS
D-01	Decision	EXAMPLE — Activity history: wave one open-deal linked only	EXAMPLE — Archive remainder; revisit wave two	_____	Open
I-01	Issue	EXAMPLE — Legacy note object has no clean target	EXAMPLE — Exclude; export PDF archive if needed	_____	Resolved

Blank rows for your project (not examples):

SIGN-OFF

Business owner

Name: _____

Date: _____

CRM owner

Name: _____

Date: _____

Migration lead

Name: _____

Date: _____

Data owner

Name: _____

Date: _____

MAPPING STATUS

- ☐ Approved for test
- ☐ Approved with exceptions
- ☐ Not approved

REMAINING BLOCKERS

List blockers that keep status Not approved or Approved with exceptions:

NEXT STEP

Use the CRM Migration Checklist and Data Migration Template to run pilot import, dual-run, and cutover with this frozen mapping.