

CRM Migration Checklist

Project / CRM: _____

Owner / Team: _____

Date: _____

Gate the data move: inventory, mapping, dry run, cutover, rollback.

HOW TO USE THIS RESOURCE

- 1** Inventory the sources
- 2** Map fields and values
- 3** Cleanse and dedupe
- 4** Dry run and fix
- 5** Freeze and cut over
- 6** Validate and watch

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. INVENTORY GATE					
1.1	Every source system listed with an owner	Shadow spreadsheets appear after cutover as "missing data" with no route back.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Objects in and out of scope written down	Unstated scope turns into an argument during the freeze window.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Open pipeline deals scoped explicitly	Open deals are the first records the business checks and the most expensive to get wrong.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	History depth decided	Activity and email history usually drives volume and effort more than contacts do.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Sensitive and regulated fields flagged	Some fields carry handling rules that a bulk export happily ignores.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. MAPPING GATE					
2.1	Field mapping workbook complete and reviewed	Similar field names routinely hide different meanings and different types.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Stage and forecast translations signed	A wrong stage map poisons every pipeline and forecast report from day one.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Owner mapping resolved, including leavers	Deals owned by inactive users become invisible work nobody chases.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Account, contact, and deal relationships preserved	Records that arrive unlinked are often worse than records that did not arrive.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Legacy record IDs stored on target records	Support questions and any re-migration both need a way back to the source record.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.6	Lead and activity strategy decided	Leaving these open guarantees a scramble inside the freeze window.	-		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3. CLEANSE & DUPLICATE GATE					
3.1	Match keys and survivorship rules defined	Duplicates created at load are far harder to clean than duplicates prevented.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
3.2	Related records follow the survivor	A merge that orphans deals or activities is not a clean merge.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
3.3	Defaults set for required target fields	Loads either fail or fill with nonsense when the source lacks a field the target requires.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.4	Exclusion list agreed before extract	Junk migrated once tends to stay for the life of the system.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. DRY-RUN GATE						
4.1	Staging matches the target configuration	A rehearsal against a different schema teaches you the wrong lesson.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	One full dry run completed and timed	The cutover window is a number you measure, not a number you guess.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Dry-run defects closed or risk-accepted	A second run that repeats the same errors wastes the rehearsal.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	Business owners validate named records	Row counts can match perfectly while the records themselves are wrong.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.5	Pipeline totals reconciled against the source	A forecast that moves after migration destroys trust in the new CRM immediately.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. CUTOVER & ROLLBACK GATE						
5.1	Freeze window agreed and communicated	Records written to the old system during extract are lost silently.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Final backups and extracts secured	Rollback is only real if the previous state still exists and someone can reach it.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Cutover runbook followed step by step	Improvised load nights produce steps nobody can reproduce or reverse.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Smoke checks pass before users return	Opening on an unverified load turns a data problem into an adoption problem.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.5	Rollback triggers and decision owner named	Mid-cutover is the worst possible time to work out who decides.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.6	Duplicate and defect watch staffed after load	Migration problems surface as people start working, not at the moment of load.	*		☐ 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.