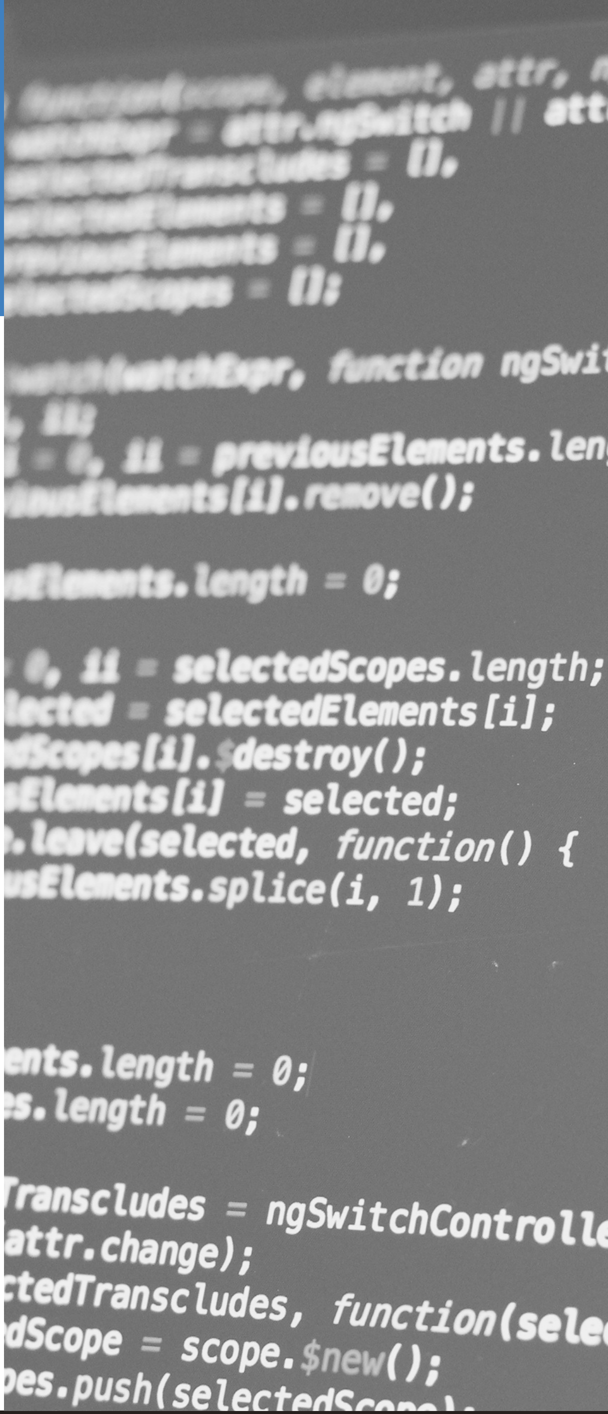
Trujay Group

TIPS & TRICKS: HOW TO SAVE TIME & MONEY ON YOUR MIGRATION

SUMMARY

Over the many years that we've been completing migration and integration projects, we've become intimately familiar with the typical struggles that come along with transferring data. Data issues become much more apparent during a migration project, and this is often the time when our customers decide to clean up their databases.

On the next few pages we'll explore some ways for you to do some of this cleanup on your own.



GENERAL

- If there are fields that you want to migrate that don't yet exist in the target system, create these and ensure that the field types match between the old system and the new one.
- For list/dropdown fields that you want to migrate that already exist in both the source and target systems, ensure that the values in the list match. For example, if you have account owners or sales reps in your source data, make sure that those reps exist in the target system.
- Do your source system files contain a unique identified for each company record? Typically, this is a series of numbers. If not, add a new column to your file and assign a unique ID to each record.

GENERAL CON'T'D

- Already know where you want the data to go in the target system? Add a new header row to your file and enter the internal field name of the target system above each column in your source file. For example, if your source file has "Address" as a column, your target system might have a field called "address1". Enter this internal name above Address.
- If you don't want to migrate all of your data, consider removing any unneeded columns from the source files.

COMPANIES/ ACCOUNTS

- When it comes to cleaning your Company data, a great place to start is by ensuring that all of your company names are unique. If they're not, consider adjusting the name of the company by appending a number to it or by adding a different unique descriptor.
- Do you want to migrate lost accounts? If not, remove these from your source files.

CONTACTS/ LEADS

- The rules for cleaning up Contact records are quite similar to the Company records, except when it comes to how to uniquely identify the records. Typically, target systems dedupe contacts and leads based on the email address. If you have duplicate email addresses in your contacts file, you'll want to either merge these contacts together in your source system and generate a new file, or you'll want to delete the duplicate email addresses or records.
- Do you have contacts without email addresses? Considering removing them from the files and uploading them into HubSpot through the UI.

OPPORTUNITIES/ DEALS

- Deals/Opportunities are typically deduped based on the deal name. So, if you have duplicate deal names, please add a unique identifier to the name of the deal or merge duplicate records.
- Typically, the target system will expect a pipeline and a stage to be set for each records. So, make sure that you replicate the setup of the pipeline and stages from your source system into your target system. Also, ensure that each record has been assigned a pipeline and a stage in your source data.

OPPORTUNITIES/ DEALS CON'T'D

- In order for the deals to show up on your new CRM's dashboard, you typically have to have an Expected Close Date and/or a close date available. If not, assign one to each record.
- Is it obviously in your source data which deals are won and which are lost? If not, add a column to the data to clearly indicate this.