

CRM Migration Starter Guide

Ready for CRM migration? Whether switching systems or entering the CRM world for the first time, explore everything about data migration for a smooth transition.



What is a CRM migration?

Whether you're switching from one CRM system to another, or embracing CRM for the first time, there is one process you will go through: CRM Migration and Implementation.



It refers to moving or transferring your data from your current CRM software to another platform. Sounds easy right? Well, it certainly can be with the right support.

Moving your CRM is more than just shifting data to a new platform. It's a bit tricky and needs careful prep and analysis to make sure your data stays safe.

You'll also want to do some research to find the best one that fits your company's needs.



WeDoCRM has the expertise to work with any system, although there are some systems we recommend more than others.

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Why do organisations make the switch?

Ever wondered why businesses make the switch to a new CRM system? Well, it's not always smooth sailing. Some platforms struggle with integration issues, leading to headaches for sales and marketing teams trying to sync data across systems.

Moreover, you might find yourself feeling restricted by limited features. Research shows that 22% of businesses switch CRMs because their current platform is just too complex to navigate effectively. And, in the worst-case scenario, data loss can occur – an unfortunate situation that deserves all the facepalm emojis for its dramatic effect! 🤦🏻🤦🏻

Sound familiar? If so, it's a sign that your CRM is in need of an upgrade because your business has outgrown its current capabilities.

The solution? You're in the right place – let's discuss the process of CRM migration to address these challenges.

22%

(Capterra*)

of businesses switch to new CRM platforms due to complexity issues.



* source: <https://www.capterra.com/resources/crm-software-buyer-insight/>

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Questions that spark a CRM change

Integration issues

Does your CRM have trouble integrating with other key business tools or systems?

Limited features

Does your current CRM lack important features necessary to meet our evolving business needs or industry standards?

Complexity

Does your CRM make things more complicated and harder to do, frustrating users and slowing down productivity?

Cost

Does your CRM cost too much – like maintenance costs, licensing fees, or hidden charges?

Scalability

Has your CRM's performance declined as your business has expanded, making it less effective at managing your data?

Data loss

Has your current CRM system experienced data loss, corruption, or security breaches due to its limitations?

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The benefits of migrating

When done right, there are loads of benefits for you and your business, it's not only about saving costs but it streamlines operations, adds flexibility, and enhances security. This results in happier clients, improved business retention, and a tidier data setup.

Cost Saving

Bye-bye extra expenses! Migrating might eliminate the pricey in-house gear or complicated support costs.

Streamline Operations

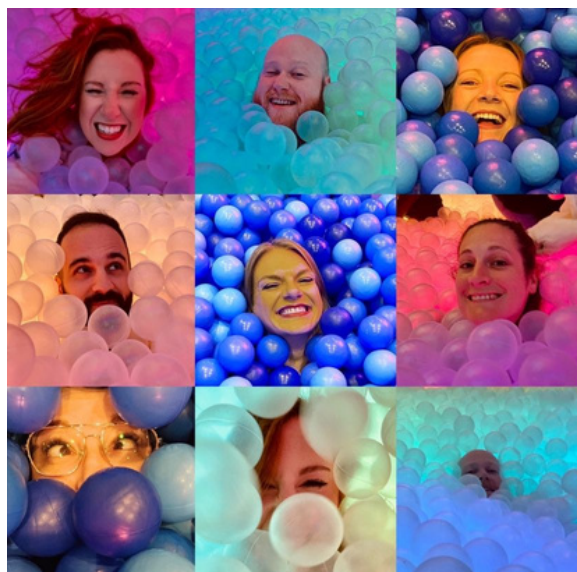
Customer management can be tough – handling contacts, diagnosing issues, and creating positive experiences can overwhelm your support team. That's where CRM software steps in, lightening the load. It integrates processes and supports key initiatives across departments.

Unlocking Flexibility

By saving money and streamlining operations, you open the door to enhanced flexibility. Imagine having the luxury of TIME – the ability to seamlessly adapt to changes, scale up effortlessly, customise everything to align with your business needs, and, focus more time on what truly matters. This not only boosts productivity but also enhances your overall return on investment (ROI).

Enhancing Security

During the transition, you're not just moving data – you're enhancing its security. In a data-driven world, success is in the details and we have written about this before – how clean data is safe data. Moving to a platform with more advanced features, you get more security features keeping your data safe and sound, allowing you to sleep at night.



Our team at WeDoCRM configures systems for easy use, giving you flexibility with or without external help.

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Avoiding challenges and risks

Customers often find the idea of switching CRM systems daunting, and we get it. The risks and challenges can be overwhelming. Moving CRM data is a tricky task that needs careful handling. One wrong move in this complex process can make things even harder.

Extended Downtime

If migration takes longer than expected, your business could face significant losses. To avoid this, consider getting expert support. This lets you focus on important tasks knowing your migration is in safe hands.

Integration Problems

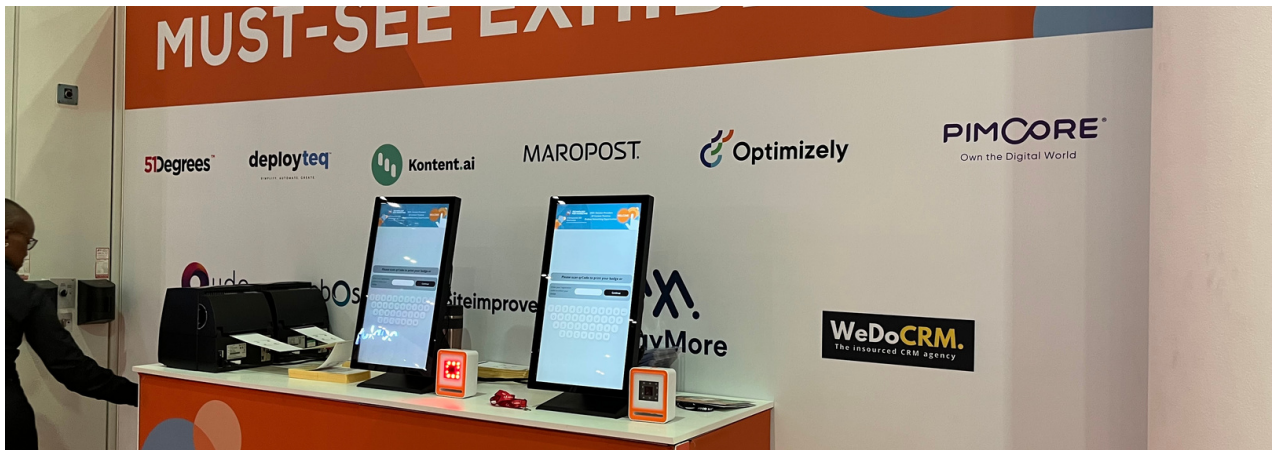
When planning your strategy, ensure you focus on your business goals from the start, including compatibility with your existing tools. Neglecting this may result in losing access to crucial insights.

Data Corruption

Moving to a new system risks corruption if unnecessary data types are included. Not auditing your data beforehand may cause problems like system crashes or messy quality.

Insufficient Staff Training

Providing training for your staff is so important. The transition to a new system can be scary, and their unfamiliarity may lead to errors, performance issues, and disruptions.



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Are you ready for CRM migration?

By addressing these questions and steps, you can better assess your readiness for CRM migration and ensure a smoother transition to the new system.

- 1) What are your current CRM pain points and limitations?
- 2) Have you clearly defined your objectives and goals for the CRM migration?
- 3) Do you have a dedicated team or individual responsible for overseeing the migration process?
- 4) Have you conducted a thorough audit of your existing CRM data to identify any inconsistencies or inaccuracies?
- 5) Have you assessed the compatibility of your current CRM data with the new CRM system?
- 6) Have you identified any potential challenges or obstacles that may arise during the migration process?
- 7) Do you have a plan in place for training employees on how to use the new CRM system effectively?
- 8) Have you established a timeline and budget for the migration project?
- 9) Have you considered the impact of the CRM migration on other systems and processes within your organisation?
- 10) Have you communicated the migration plan and expectations to all relevant stakeholders?



We hire the best MarTech and system experts at the agency to ensure you have the best technical expertise on hand.

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The CRM migration journey

Remember, it's not just about moving data around; it's a strategic move to boost your business processes. Embrace these points, and tailor them to your unique needs, you can see in more depth [how to get your crm migration right](#) over on our website.



Migrations aren't easy, which is why we ensure every project is always meticulously planned and executed.

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How to get your CRM migration right

Think about your company's roadmap

There's no sense in short-term problem-solving regarding software migration. Particularly for start-ups and small businesses – if you know you're going to grow and need additional firepower, then plan. Because we can't stress this enough; data migration is a huge job. The last thing your company needs during a period of growth is a lengthy migration process that will massively impact the business.

However, this doesn't mean you have to go all in and commit yourself to the most advanced package Salesforce has to offer on the assumption you'll grow into a £1 billion business in a few years. But you will need to balance your current needs versus your future needs as you grow and find a platform that will grow with you.

Our advice is to start with the smallest package and upgrade as you move upwards. Plus, it's easier to test features on an ad-hoc basis, than being locked into a long-term high-spec contract that you're desperate to downgrade because you're not using it.

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How to get your CRM migration right

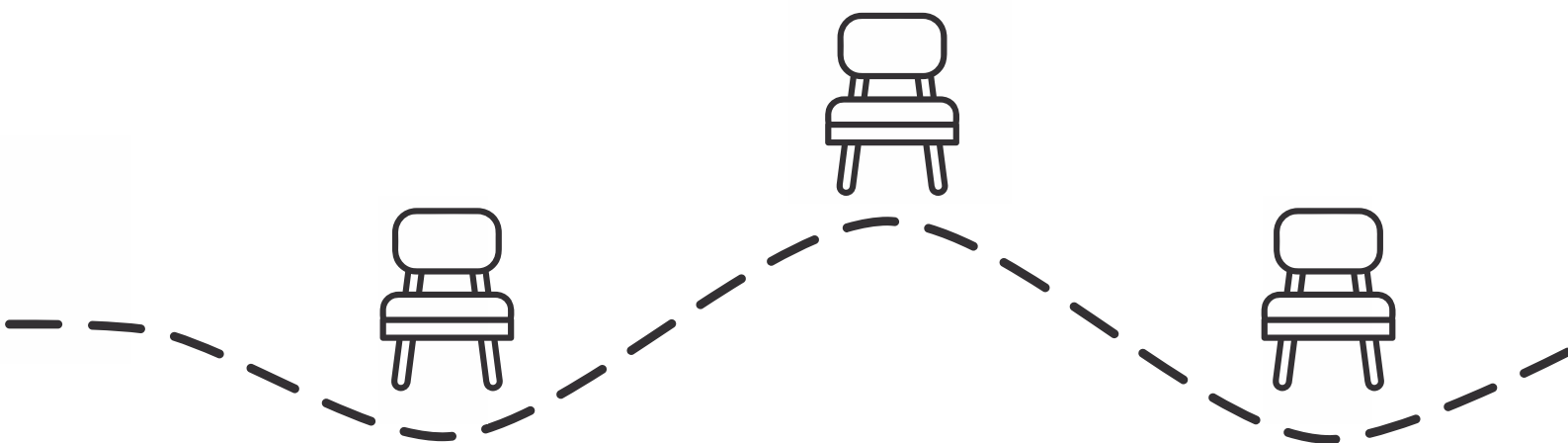
Involve all departments

As we said, data migration affects the entire business. You just might not realise how many departments it'll impact until you start talking to them. So get everyone in a room together and involve as many people as possible in the initial planning stages.

One of the key teams at both these meetings needs to be the developers. Without them, you'll have no idea what data you need and how quickly you can get it flowing once the new system is in place. They'll also be able to give you an idea of the project scale and the timeframe on the migration process.

Once you've got an idea of the platform you want and what it needs to do, get everyone back in a room together again before signing any contract.

Triple check this software is going to meet the entire company's needs. Because once you've made the switch, you can't go back.



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How to get your CRM migration right

Speak to a CRM specialist

Consider this scenario: You're wowed by a CRM system's capabilities during a demo, prompting you to sign the contract. However, after installation, you realise customization is needed, and you lack the internal expertise.

While the software company offers assistance, it comes at a high cost. Don't commit until you're confident in your ability to meet project specifications. A CRM specialist can offer fresh insights and ensure system alignment with your business needs.

We're a specialist CRM agency, which means we live and breathe all things operational and technical in the CRM sphere for B2B and B2C businesses worldwide.

Software migration is just one of the many [CRM services](#) we offer our partners, and we've successfully [helped businesses choose and migrate to their new software provider](#).

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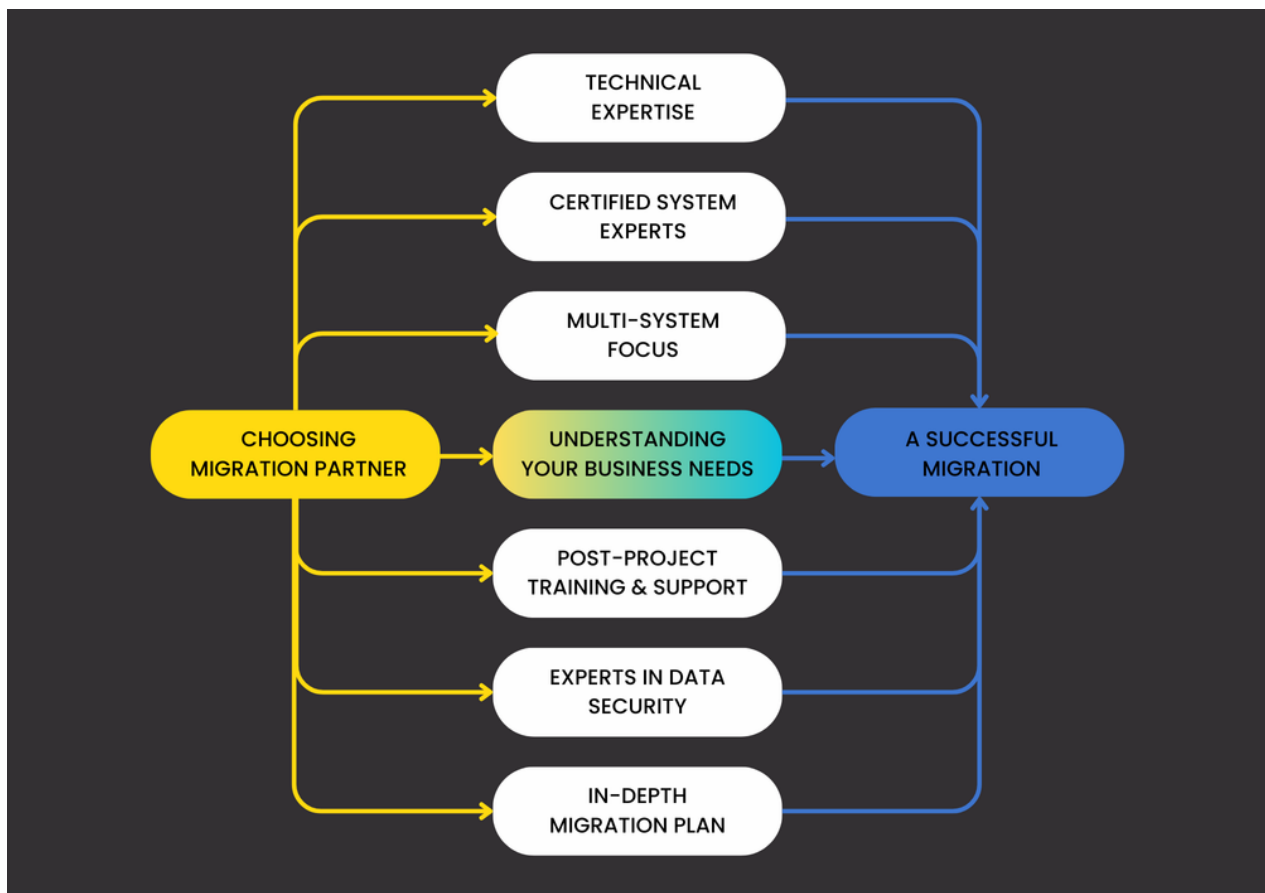
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Where to start and how we can help you

In the wise words of Mrs. Doubtfire, "Never fear, help is on the way, dear!"

First things first, dive into a careful look at your needs, and pick a platform that vibes with your goals, we hold certifications in major CRM and ESP systems like Salesforce, HubSpot, Iterable, and Customer.io to name a few and we can help you with recommendations.



Handling CRM migrations from start to finish is our bread and butter. Our [success stories](#) feature collaborations with renowned names such as GoHenry, QuidCo, and the non-profit organisation Baltic Contemporary Art.

No migration is too big or too small.

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