Salesforce CRM Readiness and Migration Checklist

Align your vision with a digital foundation built for momentum. Use this checklist to move from messy spreadsheets to a unified customer platform.

Phase 1: Strategic Planning

Define your "why" and align your team before moving a single row of data.

- [ ] **Identify your goals.** Determine if you want faster lead conversion, more accurate forecasting, or better customer service.
- [ ] **Assign clear roles.** Choose a Salesforce administrator or champion to lead the project and "change champions" in each department to help others adapt.
- [ ] **Map current workflows.** Document how your sales and service teams work now to identify bottlenecks or manual tasks you can automate.
- [ ] **Set a realistic timeline.** A small rollout often takes one to three months.

Phase 2: Data Audit and Cleansing

Clean data is the secret to a system your team actually wants to use.

- [ ] **Audit existing sources.** List every spreadsheet, legacy CRM, and app where your customer data currently lives.
- [ ] **Digital declutter.** Decide what is worth keeping. Best practice: Archive outdated leads or marketing data more than two years old.
- [ ] **Standardize formats.** Ensure all phone numbers, dates, and state or province names (e.g., "CA" vs. "California") follow one consistent style.
- [ ] **Merge duplicates.** Use tools to find and combine identical records before they enter your new system.

Phase 3: Technical Readiness

Prepare the “destination” to catch the data you are about to throw at it.

- [ ] **Create custom fields.** Build the specific fields you need for your industry before you start the import.
- [ ] **Map legacy IDs.** Create an “External ID” field in Salesforce to keep relationships between accounts and contacts intact.
- [ ] **Choose your tools.** Use the Data Import Wizard for simple lists or Data Loader for larger batches.
- [ ] **Back up everything.** Download a full export of your original data and store it separately as a safety net.

Phase 4: Execution and Testing

Test in a safe environment to catch issues early.

- [ ] **Run a “dry run” in a sandbox.** Migrate a small sample (5%–10%) first to check if fields map correctly.
- [ ] **Load in layers.** Always import parent records (accounts) first, followed by child records (contacts and opportunities).
- [ ] **Turn off automations.** Temporarily disable validation rules and triggers during the load to prevent errors.
- [ ] **Verify counts.** Compare record totals in Salesforce against your original files to ensure nothing was lost.

Phase 5: Post-Migration Success

Adoption is your true return on investment.

- [ ] **Train your teams.** Show employees where their familiar data now lives and how to use new automated features.
- [ ] **Gather feedback.** Meet with users during the first 30 days to resolve any navigation issues quickly.
- [ ] **Set data standards.** Establish rules for how new data is entered to keep your system clean long-term.

Ready to see it in action?

Start you free CRM trial