

The CRM migration checklist

33 steps from the decision to the day you cancel the old system. Works for any pair: HubSpot, Salesforce, Pipedrive, Attio, Zoho and the rest.

Tick the box when a step is done, not when it is started. The second line of each step says why it is there, so you can skip it knowingly.

Decide

Weeks 4–6 before cutover

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- ☐ **Write down the three things the new CRM must do better**
Every later trade-off is judged against these. Without them, the migration turns into a copy of the old mess.
 - ☐ **Name one owner who can say no**
Migrations stall when five people each own one field.
 - ☐ **Pick the cutover date and freeze it**
Avoid month-end and quarter-end; reps will not test during a close.
 - ☐ **Check the new CRM's import limits and API rate limits**
Record caps, file sizes and API throttling set how many days the load takes.
 - ☐ **Count what you have**
Records per object, attachments, emails, notes. The numbers decide whether CSV import is enough or you need the API.
 - ☐ **Decide what history moves**
All notes and emails, the last 2 years, or open deals only. Old activity is the slowest and least used part of a migration.
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Clean

Weeks 3–4

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- ☐ **Export a full backup from the old CRM and store it outside both systems**
Your rollback plan. Keep it for at least a year.
 - ☐ **Merge duplicate companies and contacts**
Duplicates multiply on import: one person in two lists becomes two people.
 - ☐ **Archive what nobody will miss**
Contacts with no activity in 3+ years, lost deals older than 2 years, test records.
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- ☐ **Fix the email and domain fields**
Most modern CRMs match and enrich on email and domain. Blank or shared addresses (info@) break that.
 - ☐ **Delete fields that are empty in 90%+ of records**
If nobody fills it now, nobody will fill it in the new system.
 - ☐ **Normalise picklists**
"UK", "U.K." and "United Kingdom" become one value before import, not after.
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Map

Week 3

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- ☐ **Map every object: old → new**
Leads, contacts, companies, deals, tickets, custom objects. Write down which become lists, tags or are dropped.
 - ☐ **Map every field you keep, with its type**
Text into a picklist fails silently in some tools; dates in the wrong format import as blank.
 - ☐ **Map pipelines and stages**
Stage names, order and probabilities. Decide what happens to deals in stages that no longer exist.
 - ☐ **Map users and record owners**
Owners are matched by email. Create every user before the import, including people who left.
 - ☐ **Map relationships and the load order**
Companies → people → deals → activities → notes. A child loaded before its parent loses the link.
 - ☐ **List what will not transfer**
Sequences, automations, reports, email templates, integrations. Each needs a rebuild owner and a date.
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Build and test

Weeks 1–2

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- ☐ **Build the fields, pipelines and permissions in the new CRM first**
Import into a finished structure; fixing structure after data is loaded is 5× the work.
 - ☐ **Run a test import of 100–500 real records**
Pick awkward ones: long notes, many contacts per company, multi-currency deals.
 - ☐ **Check the test records by hand against the old CRM**
Owners, dates, amounts, associations, attachments. Spot-check ten, fully.
 - ☐ **Rebuild the automations that matter on day one**
Lead assignment, deal stage tasks, notifications. The rest can wait two weeks.
 - ☐ **Reconnect integrations in the new system**
Email and calendar sync, forms, billing, support desk, enrichment. Test each with a real record.
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- ☐ **Write a one-page "how we work now" for the team**
Where deals live, what is required on each stage, who to ask.

Cut over

Cutover day

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- ☐ **Announce the freeze: no edits in the old CRM from a fixed hour**
Edits after the final export are lost.
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- ☐ **Take the final export and import in the mapped order**
Companies, people, deals, then activities and notes.
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- ☐ **Reconcile the counts**
Records per object, open pipeline value, deals per stage. Old and new must match or the gap must be explained.
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- ☐ **Switch the inbound sources**
Web forms, chat, billing webhooks and email sync now write to the new CRM.
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- ☐ **Set the old CRM to read-only, do not cancel it yet**
You will need it for questions in the first month.

After

Weeks 1–4 after

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- ☐ **Hold a 15-minute check-in with each team in week one**
Missing fields and broken views surface here, not in a survey.
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- ☐ **Rebuild the reports the leadership actually reads**
Pipeline, forecast, activity. Compare the numbers with last month's old-CRM reports.
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- ☐ **Watch adoption: logins and records created per user**
A rep with zero activity in week two is still working somewhere else.
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- ☐ **Cancel the old CRM after 30–60 days, once the backup is verified**
Download attachments and call recordings first; most vendors delete them on cancellation.

Moving between two specific CRMs? weekcrm.com/migrate has a guide for each pair: the object map, what does not transfer and the step order.

Want it done for you? Craftt runs CRM migrations end to end: george@craftt.io