CRM Migration Checklist

Switch CRMs without losing leads, data, or your mind.

scaleandprosper.com/crm-migration-checklist

PHASE 1: PLAN THE MOVE

1. Define the goal and choose an owner

- [ ] Decide why you're switching CRMs
- [ ] Write down what the new system must improve
- [ ] Name one person responsible for the migration
- [ ] Set a realistic target date

2. Audit the current CRM

- [ ] Contacts, companies, deals, and pipelines
- [ ] Custom fields, tags, lists, and segments
- [ ] Notes, tasks, and files
- [ ] Forms, landing pages, and email templates
- [ ] Automations and campaigns
- [ ] Calendars, users, permissions, and reports
- [ ] Website integrations and payment tools
- [ ] Zapier, Make, or other connectors

3. Decide what should move

- [ ] Contacts, companies, and deals
- [ ] Notes, tasks, files, and historical activity
- [ ] Custom fields, tags, and lists
- [ ] Email subscriptions and consent records
- [ ] Customer ownership and deal stages

Don't migrate junk just because it's there.

4. Clean and map the data

- [ ] Merge duplicate contacts
- [ ] Remove test records and invalid data
- [ ] Standardize names, phones, dates, and states
- [ ] Map old fields to new CRM fields
- [ ] Confirm how entities connect

A cleaner CRM won't fix dirty data by itself.

5. Back up everything

- [ ] Contact, company, and deal exports
- [ ] Suppression and unsubscribe lists
- [ ] Automation maps and email templates
- [ ] Form copy, pipeline settings, and custom fields
- [ ] User assignments, reports, and screenshots

Don't cancel the old CRM yet.

Keep access until data, forms, automations, integrations, and reports are tested in the new system.

PHASE 2: BUILD AND TEST

6. Build the new CRM structure first

- [ ] Users, permissions, and custom fields
- [ ] Pipelines, deal stages, and contact ownership
- [ ] Tags, lists, segments, and lead sources
- [ ] Email sending domains and authentication
- [ ] Calendars, products, and reporting fields

7. Rebuild automations and integrations

- [ ] Website forms, landing pages, and ad platforms
- [ ] Calendars, phone, and SMS tools
- [ ] Payment processors and membership platforms
- [ ] Zapier or Make connections
- [ ] New lead notifications and assignment
- [ ] Sales follow-up and appointment reminders
- [ ] Nurture, onboarding, and re-engagement flows
- [ ] Unsubscribe handling

A broken process in a new CRM is still broken.

8. Run a small test import

- [ ] Fields map correctly
- [ ] Contact owners and tags are assigned
- [ ] Companies connect to the right contacts
- [ ] Deals appear in the right pipeline stages
- [ ] Unsubscribed contacts stay unsubscribed
- [ ] No duplicate records created

9. Test every important customer path

- [ ] Submit a form and create a new lead
- [ ] Assign a salesperson and send email/SMS
- [ ] Book an appointment and move a deal
- [ ] Make a purchase and trigger onboarding
- [ ] Unsubscribe and update an existing contact
- [ ] View reports and attribution

PHASE 3: GO LIVE SAFELY

10. Train the team, launch, and monitor

- [ ] Show the team common daily tasks
- [ ] Document the new process
- [ ] Confirm everyone can log in
- [ ] Choose who handles questions and errors
- [ ] Run both systems side by side when practical
- [ ] Compare contact and deal totals
- [ ] Watch new leads during the first days
- [ ] Check automation errors and fix problems

Only shut down the old system after full validation.

Before you cancel the old CRM:

- [ ] Important data is in the new CRM
- [ ] Unsubscribes and permissions are accurate
- [ ] Forms and integrations send data correctly
- [ ] Important automations have been tested

Your business should serve your life, not run it.

Not sure which CRM fits? **Take the free quiz →**