Migration from a legacy CRM application example Goldmine – Approach

Most of the customers who have been using customer centric are switching to new generation CRM solutions like Salesforce.com, MS Dynamics and SugarCRM which are more account based along with other advantages. However this migration for many has been a bumpy ride from both business and technical perspective. This whitepaper elaborates the key learnings while migrating the instance and the various approaches a customer can chose from.
Migrating from a legacy customer relationship management solution like Goldmine to the new generation applications like Salesforce.com, MS Dynamics and SugarCRM is more than a technology change. The critical success factors include seamless transition of the end users along with application migration and completeness of data migration. Compromising on any of the above means putting your pipeline at risk, which I am sure no one would want.

At the same time the values brought forward by the new generation CRM solutions is compelling enough reason for them to switch.

Migration Phases

The following are the phases of application migration.

I. Discovery

In this phase you need to engage with the key business users and understand (i) The pain points which can be addressed during the switch. (ii) Customized features in legacy application which needs to be retained (iii) Demo the vanilla target system to show its capability and identify whether further customizations are desired by the client apart from matching it with legacy system.

II. Migration Strategy Finalization

In this phase you need to analyze the complete mapping of Goldmine versus target systems as their database structures are completely different.

- Identify which entities in Goldmine are being used (Vanilla / Custom)
- Map them into target system and finalize customization wherever required
- Finalize on cutoff date. In many cases businesses don’t require activity data dating to more than 1 year. Identify which data needs to be ignored during migration.

- Details the transformation required. For example in some cases many fields on goldmine can be concatenated and inserted into notes field of Salesforce.com or SugarCRM. In other cases you may want to have them as individual fields which can be searched upon

II. Instance Customization

The instance needs to be customized to incorporate by setting up custom fields, custom objects / modules, schedulers and workflows in order to match the legacy system. Incase further customizations are required over and above (as identified in Discovery Phase) the same need to be developed.

The custom developments must undergo a complete IT cycle from requirement gathering to development testing and sign off from the business users.

III. Data Mapping and Transformation Setup

The data is usually extracted from Goldmine in a excel / CSV format and the same is used as source. For managing data transformation into format which can then be used by the target application, it needs to be converted by maintaining the mapping rules.

We strongly recommend using ETL solutions like Talend / Pentaho for managing this bulk data operations instead of writing custom scripts. After the initial set of migration, the time taken for migrating the data, validation of number of rows etc need to carried out preferably with support of a business user.

IV. Cut off Final Migration and Go-Live

When you finalize the cut off date, publish the same to the end users. You may want to keep the Goldmine instance running for another 1-2 months just to be sure and to have a fallback plan.
Please note that you will usually not get any downtime for the application and hence we recommend that you plan this for any long weekend you may have in your calendar. After migrating the final set of data you must definitely get this validated and Okayed by the business users for the following:

- Completeness of Migration
- Customization in the new instance
- Validate performance is as desired
- Check the database size

Once the key business users give their ok to the new instance you are almost done.

**V. Post Go-Live Support**

First business day is critical for the application in many ways. Be ready to send emergency patches to your production instance and writing some custom code for further data issues. Remember that these will be high priority.

It is advisable that during this period you don’t take any feature enhancement request and park it in excel sheet kept somewhere. Once the production instance stabilizes a bit then you can schedule them in order of their priority.

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**About the Author**

The author of this whitepaper is a Project Manager at Veon Consulting Pvt Limited and has experience in developing applications which can leverage webservices from integration viewpoint.

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