

Salesforce Data Migration: A Checklist.

A seamless Salesforce data migration helps you reduce data silos and establish a single source of truth.

It enhances your reporting capabilities, data quality, operational efficiency, customer experiences, and cost savings.

This checklist will amplify your conversion rate through data-driven insights gained from the migration process.

Objectives outlining

- The objectives will benchmark the migration process, from planning and execution to post-migration validation.
- It will help set up the success criteria and prevent data loss.
- This will enhance cost management and data integrity through software licensing, resource allocation, consultation fees, etc.



Key data identification

- This gives you clarity regarding the data structure, quality, location, and overall scope of migration.
- For instance, you need to prioritize critical business data like transaction records or high-volume transaction logs.



Data back-up

- Lack of expertise or technical glitches may lead to data corruption and unintended data deletion. Having a data backup prevents permanent data loss that hinders your RevOps goals.
- For better results, use the Salesforce backup managed package. This allows you to schedule backups and restore data easily.
- Similarly, its built-in data export service lets you automatically export data into CSV files.



Custom field creation

- Once you identify the required fields, create them to prevent data misalignment.
- The data field in the source should have a corresponding field in the destination. Salesforce makes it easy to store legacy data in its templates.
- This becomes essential before doing data mapping.



Data template creation

- Salesforce recommends creating data templates through Excel templates for objects using data export from Data Loader.
- This should be followed by the identification of the required fields for each Object, as the order of migration will depend on the object relationship.



Data mapping

- Now the data fields from the source should be mapped to the corresponding data fields in Salesforce and vice versa.
- This ensures data consistency, accuracy, security, and compliance.
- For example, data inconsistency will arise if the two date formats DD/MM/YYYY & MM/DD/YYYY are not properly synced.



Data loading

- Data Loader application helps you export & import data in large numbers. It can be used to update the records and read, extract, and load data from CSV files or other data sources.
- It has a user-friendly interface for data mapping and executing operations.
- With its automation feature, you can schedule the import and export tasks.
- Some of its use cases include data backup, cleanup, migration, and bulk updates.



Data validation

- The report builder in the Salesforce Classic & Lightning Experience should be used to figure out record counts and to get an overview of migration.
- The exception report should be analyzed to investigate the data that could not be migrated.
- Apex triggers can be leveraged for advanced data validation. It allows you to set up custom validation rules with more flexibility than standard Salesforce features.
- Periodic data audits should be performed to ensure data accuracy and relevance.
- Lastly, ask end users to validate data.

