

CRM Migration Data Cleaning Checklist

Clean your data before the move. Your new CRM will thank you.

How to use this checklist:

Work through each section in order. Check off items as you complete them.
Don't skip the test migration - it will save you days of troubleshooting later.

1 Pre-Migration Audit

RECORD INVENTORY

- Document total record count by object type (contacts, accounts, opportunities)
- Identify records with no activity in 12+ months
- Flag records created before a cutoff date for review

DATA QUALITY ASSESSMENT

- Calculate field completeness rates for required fields
- Estimate duplicate record percentage
- Identify fields with inconsistent formatting
- Document known data quality issues from stakeholders

2 Define Source of Truth

- List all data sources being migrated (CRM, spreadsheets, marketing automation)
- Assign trust hierarchy for each source
- Document conflict resolution rules (which source wins)
- Get stakeholder sign-off on source priority

3 Duplicate Detection & Resolution

- Choose deduplication approach: pre-export, staging, or post-import
- Define matching criteria (email, name + company, phone)
- Set similarity threshold for fuzzy matching
- Establish master record selection rules
- Run duplicate detection and review results
- Merge or flag duplicates before export

4 Format Standardization

CONTACT INFORMATION

- Standardize phone numbers to consistent format (E.164 recommended)
- Normalize email addresses (lowercase, trim whitespace)
- Standardize address components (St. vs Street, state abbreviations)

NAMES & COMPANIES

- Apply consistent capitalization (Title Case for names)
- Standardize company name suffixes (LLC, Inc., Ltd.)
- Handle professional credentials consistently (MD, PhD, CPA)

DATES & VALUES

- Convert dates to consistent format
- Standardize currency and number formats

5 Field Mapping

- Create source-to-destination field mapping document
- Map picklist/dropdown value transformations
- Identify fields without destination (drop, custom field, or notes)
- Document custom object and relationship mappings
- Get technical team review of mapping document

6 Test Migration

- Export representative sample (500+ records with variety)
- Run sample through full cleaning and import process
- Verify field values arrived correctly
- Confirm relationships preserved (contacts to accounts)
- Test search functionality with imported records
- Validate integrations and workflows trigger correctly
- Have end users verify sample data quality

7 Post-Migration Validation

- Compare record counts: source vs. destination
- Spot-check 20+ random records across object types
- Verify key reports produce expected numbers
- Confirm critical integrations are functioning
- Document any data issues found for remediation
- Get user sign-off on data quality

Need Help Cleaning Your Data Before Migration?

CleanSmart automates the tedious work of data cleaning so you can focus on what matters: a successful migration.

- ✓ SmartMatch™ duplicate detection with semantic matching
- ✓ AutoFormat standardization for phones, emails, addresses
- ✓ SmartFill™ intelligent missing value prediction
- ✓ LogicGuard anomaly detection and data validation
- ✓ Complete audit trail for every change

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Clean your CRM data in minutes, not weeks.