

5 Common Data Migration Challenges with AMS Integrations



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Data Migration Myths



Data migration

to Live system is faster or it doesn't take much time.

Migrating data

Is basically copying data from system into another.

Data migration

Is a one-time activity, and once performed, we can sit back and relax.

Top 5 Challenges in AMS Data Migration

And How to Tackle Them

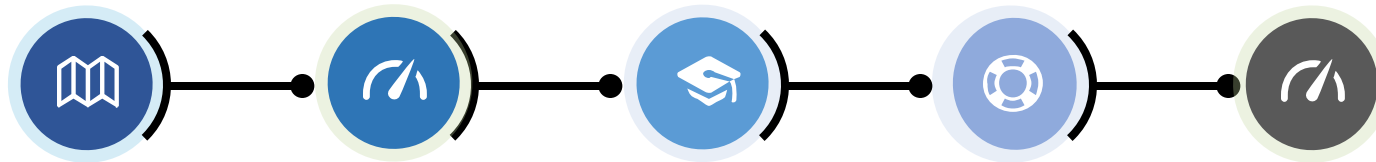


#1: Ensuring Right Data in the System

Data Quality

Example - contact email can be mandatory in the new system, but not in a 20-year-old legacy system

Data quality significantly influences effort: the further we go in history, the bigger mess we will discover



New systems have new rules, which may be violated with legacy data

Mines can be hidden in historical data - using European currencies that do not exist anymore need to be converted to Euros

Thus, it is vital to decide early on how much history we want to transfer into the new system

In-depth data analysis, data cleansing and understanding the legacy system is necessary for a smooth roll out

salesforce



Duplicates

- By email address
- Different first names
- Multiple addresses

Inaccurate

- Wrong Phone Numbers
- Membership/Donor Details

Inconsistent

- State Abbreviation vs. Full Name
- Naming Convention of Opportunities
- mm/dd/yy vs dd/mm/yyyy

Invalid

- Extra characters in email
- Too many digits in phone
- State/Country Mismatch
- Archived Membership Type

Incomplete

- Missing Phone Numbers
- No Organizational Name
- Empty State Fields

Dirty Data

Data Cleansing Cycle



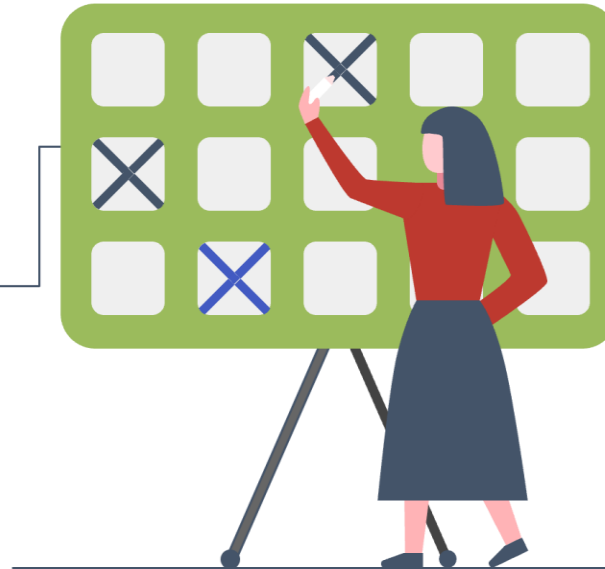
💡 In-depth data analysis, data cleansing and understanding the legacy system is necessary for a smooth roll out.

💡 Make sure the project has time dedicated to removing unused, outdated, duplicate and incorrect data at multiple stages.

#2: Handling Data Mapping Complexities



Data migration is not an “export and import” item handled by a clever “push one button” data migration tool that has predefined mapping for target systems



Data migration is a complex activity, deserving a separate project, plan, approach, budget, and team. A plan must be created at the beginning, ensuring no surprises, two weeks before the deadline.

Data Migration Framework

What should it look like

Understand Your SF Data

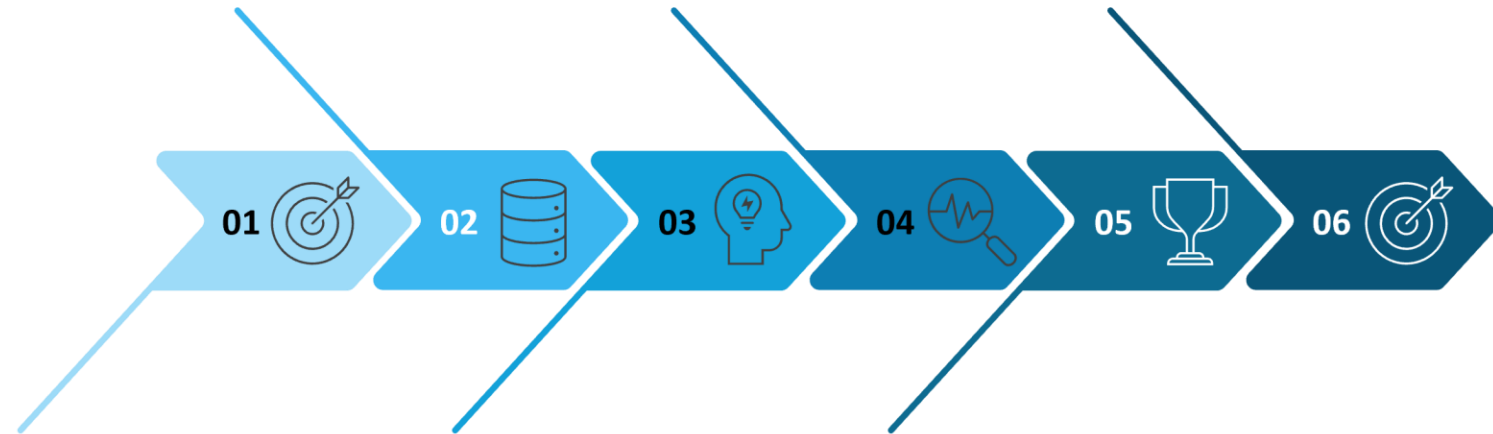
- ✓ Classify data for Migration, Archival, Purge
- ✓ Understand the current data structure
- ✓ Understand Salesforce objects nature and limitation

Complete & Verify Test Migration

- ✓ Plan for test data not just testing process. Use real data whenever possible to see real impact.
- ✓ Test for not just consistency, but also usability, org readiness.

Post Migration Activities

- ✓ Activate Validation Rules, Workflow Rules, and Triggers that were deactivated for Data Migration



Governance

- ✓ Identify Stakeholders, key team members
- ✓ Set Goals

Prepare Data & Destination Org

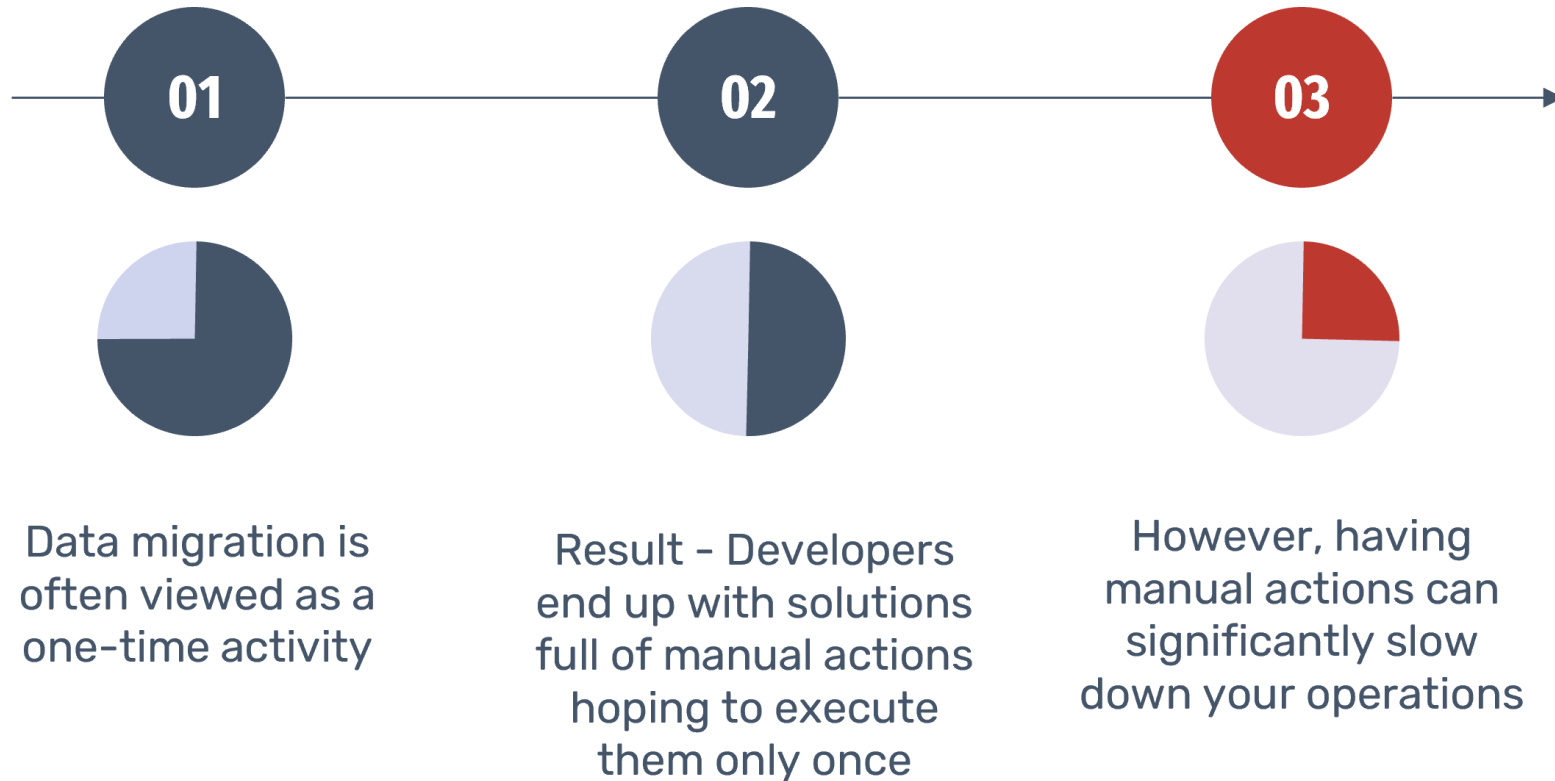
- ✓ Export data from existing system & data consolidation
- ✓ Data Cleansing
- ✓ Field Mapping

Migrate & Validate Data

The actual Production Import

#3: Ensuring Greater Success *with Automated Migration*

The Challenge



#4: Handling Existing Workflows with Care

Review Workflows, Always

Disable

Make sure to disable any active workflow before importing data



Changes

Additionally, check if past validation rules demand any changes for further processes

#4: Handling Existing Workflows with Care

The Challenge

01

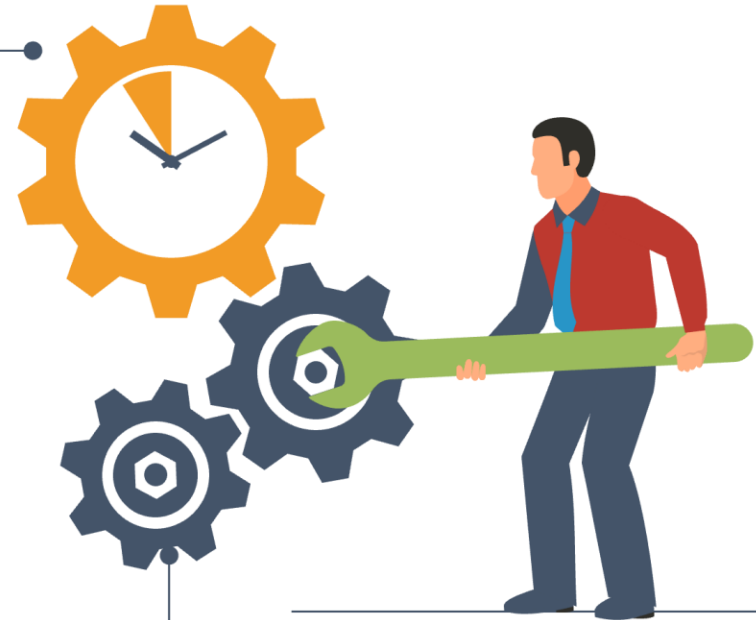
Unwanted Emails

If previous workflows or triggers are still active, you might end up sending unwanted emails to your members

02

Disruption

If you don't disable the active triggers it might hamper the progress in migration



#5:

Solving the “Testing” Riddle

Test, Evaluate, Repeat



Test, Evaluate and Repeat

It's great to see your plan going how you imagined it to go but when migrating Data choosing to stay on cloud nine might be a Red Flag!

Just because the data loader went through a successful execution doesn't mean that the entire data was migrated successfully.

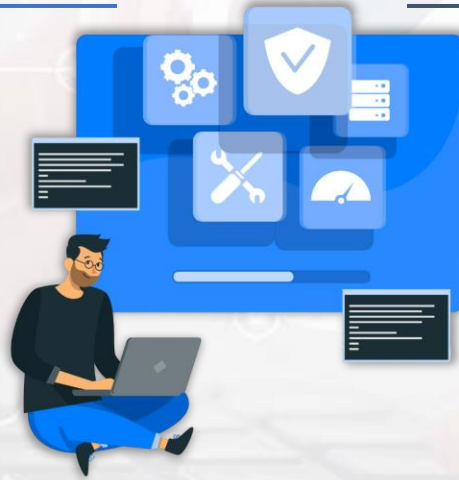
#5: Solving the “Testing” Riddle

GOAL 1

Testing should be a critical-path activity throughout the migration, not just at the end.

GOAL 2

Define who will test and evaluate data as well as sign off on the tests' results.



GOAL 3

Once the migration is complete, repeat testing.

GOAL 4

Issues detected? Schedule follow-up meetings with your stakeholders.

GOAL 5

Pen down lessons learned and action plans to avoid repeating same mistakes.

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