



CRM Data Migration Checklist

Planning & Scope Definition

Define the scope of the data migration, including data sources, target CRM, and objectives.

Project Goals & Objectives

Write something...

Estimated Data Volume (Records)

Enter a number...

Source CRM System

- ☐ Salesforce
- ☐ Microsoft Dynamics 365
- ☐ HubSpot
- ☐ Zoho CRM
- ☐ Other

Target CRM System

- ☐ Salesforce
- ☐ Microsoft Dynamics 365