

Switching CRM without losing your data

A one-week migration plan for small teams: what to export, what to leave behind, how to map fields so the new system fits how you work, and how to cut over without anyone losing a customer along the way.

How to use this

1. **Read it once end to end.** The order matters: every step makes the next one smaller.
2. **Do day 0 before you choose anything.** Exporting your data first means you own your history whatever you decide.
3. **Fill in the worksheets.** The field map and the import log are the two pages people wish they had kept. Print them or copy them into a spreadsheet.
4. **Give it a week, not a weekend.** One week with the old system read-only beside the new one is what makes a migration stick.

Day 0

Export everything

Day 1

Decide what moves

Day 2

Clean and map

Day 3

Import and check

Days 4 to 8

**Run both, then cut
over**

The plan works for any move between CRMs or from spreadsheets. Where it helps, a short note says how GuardenerAI handles that step, so you know exactly what to expect if you move to us.

The reason teams stay on a CRM they dislike is rarely the CRM. It is the fear that moving will lose something: a note from two years ago, an invoice trail, the one field the whole process depends on. Exporting first takes that fear off the table. Once the files are on your own drive, nothing that happens next can lose your history.

EXPORT	WHAT TO INCLUDE	WHY IT MATTERS	DONE
Contacts and companies	Every field, including ones you believe are empty, plus each record's unique ID from the old system.	The IDs let you link people to companies on import and re-run an import without creating copies.	☐
Deals or opportunities	Name, stage, value, owner, expected close date, and the ID of the company and contact each belongs to.	Your pipeline is your forecast. Without the owner and close date it is just a list.	☐
Activity history	Notes, calls, meetings and logged emails, with the record each one belongs to and its date.	Most of it will not move, and that is fine. You keep it so you can look things up.	☐
Invoices and payments	Open invoices with balances due, and a summary of paid ones, if your CRM holds them.	Money owed to you is the one thing that must not fall between two systems.	☐

Export tips that save a day later

- **Export to CSV, one file per record type.** If your system only gives you Excel workbooks, save each sheet as its own CSV.
- **Keep the raw exports untouched.** Copy them into a working folder and edit the copies. The originals are your backup.
- **Write down the row counts.** How many contacts, companies, open deals and open invoices you exported. You will check them against the import.
- **Export users too.** A list of who owns what lets you map record owners to the right people in the new system.

IN GUARDENERAI

Imports take CSV files. Every list in GuardenerAI can also be exported to CSV at any time, so the same discipline works in both directions.

The instinct is to migrate everything. Resist it. A migration is the only free chance you will get to leave years of clutter behind. Anything you leave out is still in your export files, so leaving it behind costs nothing.

Bring across

- Active customers, and anyone you have dealt with in the last 24 months
- Every open deal, with its stage, value, owner and close date
- Anything with an invoice still open
- Referral partners and suppliers you still work with
- The handful of notes your team actually looks things up in

Leave in the export

- Deals lost more than a year ago
- Contacts with no activity, ever
- Duplicates you have been meaning to merge (merge them in the spreadsheet instead)
- Old activity logs nobody has opened in a year
- Fields that were only ever filled in once

The one test for any record

If it moved across and nobody looked at it in the next six months, it did not need to move. When in doubt, leave it in the export and bring it across later if anyone asks for it. They rarely do.

RECORD TYPE	EXPORTED	BRINGING ACROSS	LEFT IN THE EXPORT
Contacts			
Companies			
Open deals			
Open invoices			

Cleaning in a spreadsheet is faster than cleaning in any CRM, because you can sort, filter and fix a whole column at once. Do it before the import, in this order, because each step makes the next one easier.

☐ 01

Standardise phone numbers

Pick one format, ideally with the country code, and apply it to the whole column. Two records with "(512) 555 0147" and "+15125550147" are the same person, and a duplicate check will only see that once the formats match.

☐ 02

Lowercase and trim email addresses

Remove spaces and capitals, then sort the column. Obvious typos (missing domain, a comma instead of a dot) jump out of a sorted list.

☐ 03

Normalise company names

"Acme Ltd", "ACME Limited" and "Acme" should become one spelling. Do this before de-duplicating, or the duplicates stay hidden.

☐ 04

Merge duplicates in the sheet

Sort by email, then by phone, then by company name, and combine the rows that are the same customer. Keep the most recent details and the old system's ID of the record you keep.

☐ 05

Make sure every row has an ID

Every company, contact and deal should carry its old system ID in its own column. Contacts should also carry their company's ID, and deals the IDs of their company and contact. These are what link records together on import.

☐ 06

Fix your select values

Fields with a fixed list of values (stage, status, industry, lead source) should only contain values that exist in the new system. List the distinct values in each column and map them before import.

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Imports save rows straight in, without running the duplicate and validation rules that check records typed in by hand, so cleaning the file first matters. A nightly scan then flags any duplicates that did arrive by import, and they wait in the duplicate review queue for a person to merge.

Order matters because records point at each other. Import the things other records point to first, so every link has something to land on.

- 1. **Users.** Invite the team first, so owners can be assigned on import.
- 2. **Companies.** Each with its old system ID.
- 3. **Contacts.** Linked to their company by the company's old ID.
- 4. **Deals.** Linked to their company and contact by old ID, with stage, value, owner and close date.
- 5. **Open invoices.** Re-issue open invoices in the new system so payments land in one place. Keep paid history in your export.
- 6. **The notes that matter.** Add the handful of notes your team really uses by hand, or attach the old activity export as a file to the records that need it.

Test with 20 rows first

Before importing a whole file, import 20 rows. Open five of the new records and check every field landed where you expected, that links to companies worked, and that dates and amounts kept their format. Fix the mapping, delete the test rows, then import the rest.

IMPORT LOG	ROWS IN FILE	CREATED	UPDATED	ERRORS	FIXED
Companies					
Contacts					
Deals					
Invoices					

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Import jobs run in the background and give you a results file row by row, so errors are easy to find and fix. Rows matched by ID or external ID update the existing record instead of creating a copy, which means you can safely re-run an import after fixing the file.

Days 4 to 8. Run both, then cut over

A hard cutover with no safety net is what makes teams panic and go back. Instead, keep the old system open but read-only for one working week. New work happens in the new system; the old one is a reference you consult less every day.

DAY	WHAT HAPPENS	WHO
Day 4	Go live. Everyone logs in to the new system. The old one is set to read-only or everyone is asked not to edit it. New leads and deals go into the new system only.	Whole team
Day 5	Fix the gaps. Collect every "I can't find X" in one shared list. Most are a missing field or a filter, not missing data.	Owner of the move
Day 6	Check the numbers. Compare record counts and pipeline value against your Day 0 counts. Investigate any difference.	Owner of the move
Day 7	Set up the routines. Saved views for each person's work, follow-up tasks, and the reports you check every week.	Team leads
Day 8	Cut over. Close the gap list, export the old system one last time, and cancel it when the contract allows.	Owner of the move

Three rules for the parallel week

- **One place for new work.** The moment someone adds a deal to the old system, you have two sources of truth again.
- **One owner.** One person keeps the gap list and decides what gets fixed. Migrations by committee drift.
- **Write things down.** The gap list becomes the onboarding notes for the next person you hire.

A migration is finished when the data stops degrading.

Moving clean data into a new system is half the job. If nothing about how records get in has changed, the same duplicates and gaps return within months, and you have moved the old problem into nicer software. Put these in place in the first month.

Rules on entry

Required fields and format checks on the records people type in, so a bad email never gets saved in the first place.

Duplicate checks

Match on email, phone and company name, and review flagged pairs every week before they pile up.

Owners and next steps

Every open deal has an owner and a dated next step. A deal with neither is the first one to be lost.

One weekly review

Fifteen minutes with the pipeline and the duplicate queue each week beats a cleanup project every year.

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Validation rules stop a bad record being saved, enrichment rules fill fields from decision tables you write, and duplicate rules flag or block likely matches on persons, companies and leads. Flagged pairs wait in a review queue where you merge them field by field, with tasks, opportunities, files and email moving to the record you keep.

Want help with your move? Start free at guardenerai.com and import your first file today, or book a walkthrough and we will look at your export with you.