

5 key tips for successful data migration for membership bodies

Your data is your biggest asset in managing member relationships – it can't be left to chance



Far too many projects struggle with migrating data into the new system and it must be recognised as a key area of risk for your project – and treated with respect to avoid surprises.

With a little thought, it's easy to see why it can be unpredictable. A typical challenge on a membership CRM project can be expressed as:



We need to collate every scrap of transactional, engagement and financial data about our members that is currently held in multiple disconnected systems and spreadsheets so that it can be de-duplicated, cleaned up and linked-together into a comprehensive single-view.



The data migration is detailed, time-consuming and often underestimated. It's also absolutely vital to the success of the project – no data migration, no go-live. Or to express it as a too-common reality, poor data migration, poor go-live and lots of complaints for years afterwards!

For all of these reasons, **smartimpact** have developed a robust methodology and specialisation around the art-and-science of data migration – we even like doing them!

Here are 5 key tips that are crucial to making your data migration a solid foundation for your project, (instead of a living nightmare).



1 Prioritise data quality

One of the biggest challenges of data migration is ensuring the accuracy of the data during the transfer process. To mitigate this risk, it's important to prioritise data quality and ensure that the data is clean, complete, and up-to-date before the migration process begins.

In practise, this means starting with a formal review for all data source that may be included in the migration and being prepared to discard them if the quality is poor, or it cannot easily be linked to other data about the same people or organisations. For instance, an ancient list of event delegates in Excel can be a lot more trouble that it is worth, and can make your data quality worse by leading to duplicate records. Likewise, payment history from more than a few years ago can be extremely fiddly to migrate correctly compared to a small amount of ongoing benefit from the data.

To be included in the migration project data sources should be high-volume (at least a thousand rows) and regular enough that you can make some rules about it.



2 Resource your data migration properly

The right supplier can do a lot of the work for you, but there is still a demand on your organisation to extract the data, review it, make decisions and then test the migration process. This is also a repeatable process since no one gets it right first time. Most data migrations require consistent effort all throughout the project.



3 Involve all stakeholders

Data migration can have a significant impact on different departments and members, so it's important to involve all stakeholders in the process. This includes ensuring that your IT department, membership department, and other key stakeholders are fully informed and engaged.

Your stakeholders also cannot be allowed to 'dump' their data on the technical team and run off. They must take part in describing the data, where it came from, and making decisions about where it will be migrated to. Failure to include the 'owners' of each data source throughout the process will result in lots of misunderstandings and complaints when the data is migrated.



4 Test thoroughly

Before conducting the actual data migration, it's essential to conduct thorough testing to ensure that the data is being transferred correctly. This includes testing the data migration process, the new system, and the data itself to ensure that everything is working as expected.

Testing is also an important opportunity to include your stakeholders in the project so that the go-live is not a complete shock to them. If you view testing as a benefit and not just a chore, your outcomes will improve considerably.



Communicate with everybody

Data migration can have an impact on members as well as staff, so it's important to communicate with them about the process, the timeline, and any potential changes or disruptions. This can help minimise confusion and ensure that staff and members remain engaged and supportive throughout the process.

In conclusion

Data migration for membership bodies is a complex and critical process that requires careful planning and execution to ensure success. By following these five key tips, you can minimise the risks and ensure that your data migration is successful and effective.

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