

## Migrating from GoldMine to Salesforce: 10 mistakes to avoid

Your business has been using GoldMine for years but you're thinking about moving to Salesforce.com, or maybe you've already decided to make the move. Your GoldMine system may have many years of contact history, lots of customization, inconsistent usage by many users, and other complicating factors. You know you'll need some outside help, but you don't know who to use or how to approach it. Below is some guidance based on Nelson Tech's real-world experience.

### 4 major shortcomings in consultants

Be careful in selecting a consultant; it's easy to waste thousands of dollars and months of your time with the wrong firm. Here are the top four shortcomings to avoid:

1. **Insufficient GoldMine expertise** This is the big one! Some Salesforce consulting firms have an attitude – they think GoldMine is a toy system, but think they know all about Salesforce, so assume that migrating from GoldMine will be simple. If you've been doing complex things with GoldMine for years, you know better. Your consulting team should include a GoldMine expert, in addition to strong expertise with Salesforce.
2. **Inadequate tools** If your consultants only know how to manipulate data in Excel or import into Salesforce with the Import Wizards, they can't effectively deal with large or complex databases. Anything other than the simplest migrations requires intermediate data manipulation between GoldMine and Salesforce using strong data tools like Microsoft Access, and import with more advanced data loader / integration tools.
3. **Lack of technical breadth and depth** Many Salesforce consultants have little technical capability outside Salesforce, so are unable to handle conversion challenges like Notes, History records including email, user-defined fields, inconsistent use of Details and Additional Contacts, etc. If your GoldMine system uses a SQL Server database (e.g., Corporate, Premium, Enterprise Editions) the consultant may need SQL Server skills.
4. **Lack of direct experience** You probably can't afford to have the consultant learn the ropes on your nickel. If they haven't been through at least several successful GM-SF migrations, they may have trouble with anything very complex.

### 6 biggest project mistakes

If you select an expert consultant team, they'll make sure you follow a proven methodology in your migration project, which will maximize success and minimize cost and headaches. If not, here are the biggest mistakes to avoid:

1. **Not analyzing your GoldMine data adequately** To avoid data a conversion nightmare, you must thoroughly assess what's in GoldMine before planning the conversion; then you have a basis for deciding what to clean up, what to import and how, and how to map it to Salesforce.

2. **Converting too much data** If you had very little data in GoldMine, this wouldn't be an issue – but you probably have 5-15 years of data, some of which isn't needed in your new Salesforce system. The quantity of data converted can have a huge impact on project cost, so you need to make intelligent decisions about what to convert.
3. **Inadequate data cleanup** The odds are your GoldMine data has inconsistencies that will make conversion more complicated. You need to decide what to clean up in GoldMine before the conversion, what to cleanup during the conversion using good data manipulation tools, and what to clean up in Salesforce after the conversion.
4. **Not having a clear mapping plan** GoldMine's contact-centric data structure is fundamentally different from Salesforce's Account/Contact structure, but there are many other key differences. If you don't figure the details out before the conversion process, you'll probably have a mess on your hands, and a lot of rework to do.
5. **Overlooking missing functionality in Salesforce** As robust as Salesforce is, it has some surprising shortcomings (that some Salesforce consultants aren't aware of) and has no equivalent functionality for some GoldMine features that you may take for granted, like Groups and integrated email. You'll have unhappy and unproductive Salesforce users if you don't plan for this.
6. **Poor planning** Lack of careful planning can sink any migration project, but is especially dangerous when going from GoldMine to Salesforce due to the many differences between the two systems. Good up-front planning must be combined with a flexible project approach that includes plan changes as unexpected issues arise – or when the reality starts to sink in: your GoldMine data is really a mess!

### **And... the single most important key to success!**

Nelson Tech knows how to get your business migrated to Salesforce quickly and cost-effectively. If you work with us and avoid the 6 project mistakes above, then the one factor that will make your project a success is you:

1. **Client involvement** If you are active, involved and committed, and work closely with us from planning through deployment and training, your migration project will go smoothly and predictably. You'll need to assign a small project team and set aside time to work with us. Together we'll analyze your business needs, your GoldMine data, and your plans for Salesforce, then get your data converted and get your team up and running on Salesforce. It will take serious involvement by your team, but will be well worth it and will save time and money overall. Before long, you'll be reaping the benefits of the top cloud CRM system and your business will be well on the way to a new age of productivity and success.

**Contact Nelson Tech for more detailed information and a realistic appraisal of your situation.**