<u>Data Migration Best Practices -- Transformation and Import:</u>

<u>Marie's Philosophy:</u>

1. NEVER directly manipulate raw files from clients
2. GOAL is to have reusable template so initial/test import can be reused with NO MANUAL intervention on Go Live
3. GOAL is for client to PROVIDE US THEIR DATE without doing ANY MANUAL manipulation of data to get it from their current system/s to Sell/us
    a. Most systems have report/export functionality. This is what you want clients to use. If they're doing any "data cleanup" -- meaning cleaning up Ownership, Contact information, etc -- you want them to do it directly in their current system (or in Sell once live) -- but definitely not a requirement.
    b. Contact information won't always be accurate (frequently won't be accurate) -- but going live on a new CRM/tool isn't necessarily the best/necessary time to force any cleanup.
        i. e.g. if we moved Zendesk to Sell from Salesforce -- would we require Reps/Mgrs to clean/validate their data in SF first?
            1. Answer: almost 100% no -- the biggest focus area/importance is that we map over and configure Sell in the way it should be. Dirty raw data is fine (and is the business we're in…).
            2. Saying that -- if clients want to use the new CRM as their forcing function to clean their data, totally fine/good -- but their call -- and do it in Old vs. New.

<u>Marie's Overall Approach:</u>

1. Create Excel Template with 1 tab per Raw data file
    a. can include export from Sell as a file here
2. Create a Mapping Tab for all your lookup/update tables
3. Create a "Template" Tab where you will write all your formulas
    a. Raw data inputs + Mappings tab → Import file
4. When you're ready to Import
    a. Select fields (columns/rows) → Copy/Paste as Values into "Import Tab" in Master Template
    b. Move/Copy each Tab into its own workbook to save as a CSV

Example Spreadsheet:

1. **<u>Data Discovery</u>**
    a. Kickoff
        i. On the Kick-off Call, IC should start to understand where their data will be coming from and tee up request for sample data (should be a next step on the last slide).

        ii. Follow-up to obtain sample data to review ASAP! Need to know what they're/you're working with before committing/rolling out any project Go Live timeline
    b. Review Data Migration Strategy Checklist in the IC Toolbox PDF (pages 14-18)
        i. Summarizing main/critical points here -- but please review the PDF for tables and examples.
    c. Building Framework for Data Strategy
        i. Ask the questions below as probing questions to fill in the following table:
            1. What type of data is collected/ stored today?
            2. For each type, explain what exactly this piece of data is and how it is used?
            3. In what Systems do each of them live?
            4. How "clean" do you expect each to be?
    d. Overview of Steps:
        i. Data Strategy, understanding the "landscape"
            1. Have conversations during Discovery - ask for existing system architecture, org structure, etc. with a questionnaire
            2. Always ask about their other systems and Introduce integration conversations earlier
            3. Can bring in Solution Architect for custom work/middleware/etc. if necessary
            4. Map system architecture and data flows
                - How are you getting data in and out?
            5. Integrations tab in Solution Doc
        ii. Understanding the Data
            1. Ask the questions below as probing questions to get an understanding of the data:
                - For each "Type of Data", what are the sub-objects inside that are relevant to a Sales person? Ex: Note, Task, Appointment on the Contact "Type"
                - How does this "Type of Data" enable your Sales team to sell more effectively? What type of information does it give them and how does this impact the way they sell?

2. **Data Mapping/Cleaning/Formatting**
    a. Important to note here that the Data Cleaning aspect is mainly the responsibility of the client. As an Implementation team member, you should guide and provide instruction on how to clean and map the data for use in Sell. Your key responsibility is to ensure that the client understands the need for a clean and useful database.
    b. **Available Templates:**
        i. Data Import Mapping Template & Guide - Holds good tips and tricks for import - especially above Field Columns.

    ii. Data Mapping Sheet - Helps you map and discuss data, as well as plan actions for the client.
    iii. Data Migration (should be included in your Solution Document) - Helps you configure Sell - with various Customizable Standard Fields and Custom Fields.

c. **How to prepare for Data Reviews with client:**
    i. Use Data Mapping Sheet in Data Folder of IMP Folder.
    ii. If using Google Sheets, copy and paste client's sample data into this template.
    iii. If using Excel, insert rows 1-5 from template into Excel (might have to re-create data validation)
    iv. Prepare any questions and suggestions specific to each column (use recommendations and comments rows)

d. **During the Data Review:**
    i. Determine with client if existing data should be migrated (column by column basis)
    ii. If yes, map client's columns to fields in Sell (standard and custom fields with field types)
    iii. Take this time to highlight data cleanliness and assign clear data cleaning instructions. Use "Confirmed Action" and "Comments" rows to identify and track data cleanup effort.
    iv. Receive confirmation that all data suggestions are understood and the client is clear on next data steps (if any).
    v. Last data review session: Best practice is to schedule a final data review to confirm all data cleanup and mapping is complete (this should be at least a few business days before you receive the final files).

e. **Data Transformation/Formatting/Import Template Suggestions**:
    i. Useful Excel formulas/functions: Proper, Trim, Filter for Blanks, Find Duplicates, vLookUp, Match, Text to Column (Parsing), Find and Replace, IF Statements
    ii. Use unique identifiers in vlookups whenever possible
    iii. Date formatting (American): MM/DD/YYYY
    iv. Number formatting: No delimiters (i.e., no decimals, commas or currency signs) -- need to round.
    v. Zip Code formatting - In Excel - Highlight column, right click - Format Cells > Special > Zipcode
    vi. Phone number formatting - In Excel - Highlight column, right click - Format Cells > Special > Phone number
    vii. Make all fields Text in Template -- except for Date fields.
        1. Will prevent fields from being in sci format -- which will mess up data load.
            - PREVENTS NEED FOR: If any of your phone numbers are in scientific format (e.g. 5.56E+09) within a Google Sheet

tab that you want to save as a CSV, change the format of these numbers to Number > Automatic BEFORE saving the tab as a CSV. If you save it before reformatting, the number will not be saved properly (e.g. 5555555555 in Google formatted as 5.56E+09 will be saved to CSV as 5560000000).

viii. Ensure all Deal Names follow agreed naming convention IF CREATING DEAL NAME

ix. Addresses must be split into separate columns - Street, City, State, Country, Zip

x. *Zendesk Sell can split Names into First and Last so the below isn't required
    1. Names must be split into separate columns for First Name and Last Name
    2. Any prefixes should be in the First Name column
    3. Any suffixes should be in the Last Name column

xi. Notes: Create a new column for each separate note or task

xii. Tags: Either create a new column for each separate tag OR have them separated by a comma and space within 1 column

xiii. Required fields for Import -- the following can't be NULL -- you need to input a value (even if you create it from other values)
    1. Lead -- Company name OR Last Name are required
    2. Company Contact -- Company Name is required
    3. Person Contact -- Last Name is required
    4. Deal -- Deal Name

xiv. If CF for Person and Company fields, need to create duplicate columns for each object type in Import Template file

xv. If no data in first 5-10 rows, that column will not be available to import
    1. recommended process -- create the first row in Template tab as a "Test row" with a "Test Name" and map sample data in first row, then remve the Test records on/before/after Go Live)

xvi. Always try and get Client's previous CRM Unique ID for each main record type. This is critical for your duplication check to ensure Client pulled file correctly -- but also recommended you use the "Skype" field to load it to Sell (to take advantage of current Duplicate Mgmt Setting options). If using Skype, recommend also having Custom field for each Object Type with this ID as well that you'll retain post Go Live (when you most likely would want to nullify the Skype field).

f. **Data Mapping / Update Sell / Solution Doc tabs:**

    i. Update leads, contact, deals tabs with Custom fields and customizable standard field dropdowns

g. **CSV File FYIs:**

i. CSVs do NOT save formulas. The below should be done in Excel before saving the final file as a CSV.
    1. Right click on the blank column and select “paste special”. Then, select “values” and click OK. Delete the column with the formulas.

ii. CSVs only save 1 tab
    1. If you’re working out of an Excel spreadsheet with multiple tabs, save this file as the “All Data” file. Then, copy and paste each tab into its own new workbook and save those files as CSVs with specific file names (i.e., Company_Leads_Import#_Record#s_Date).
    2. Make sure all filters are cleared before copying and pasting!

iii. Saving tabs in Google Sheets as CSVs will NOT preserve special characters (e.g. á, Cyrillic characters, Chinese characters)
    1. If you know your leads or contacts have special characters in their names, it’s best to copy-paste columns from Google Sheets into an Excel file and then save it as a CSV.
    2. If you save a tab in Google sheets as a CSV, special characters will be replaced with underscores.

iv. When saving CSVs with special characters, make sure to save in the “CSV UTF-8” format as opposed to regular CSV, since only the former will preserve your special characters.

h. **Final Steps:**
    i. Confirm final data migration date in conjunction with the Go-live Date
    ii. Even if client is migrating from an existing system with significant daily activity, give yourself a minimum of 2-3 business days to complete the final import/s
    iii. Clearly communicate data freeze period - send them data mapping template
    iv. Recommend 1 person handle all data entry during this period

3. **Tech Support** -- determine which part of the final data migration you need help from Tech Support - use this email template
    a. Approach:
        i. **Coordinate ahead of time!**
        ii. Tech Support needs at least 1 week to complete the ticket.
        iii. If the request includes more than 10,000 records, they need at least a 1-week notice. Send an email to tech support to give them the notice and then follow-up with the files ASAP.
        iv. If the requests include more than 50,000 records total, Tech Support’s estimated time of completion is 2 weeks - communicate early and often with all parties involved (Tech Support and client)
        v. If your client is migrating from an existing system with significant daily activity and they have more than 10,000 records which need assistance

from Tech Support, clearly communicate to your client that the Tech Support ticket might not be completed until a day or two after training

   vi. Import “migration only fields” then export smart list to provide Tech Support
   vii. Email tech support (techsupport@getbase.zendesk.com) with your file/s and specific request/s.

b. **What needs to be imported by Tech Support?**
   i. Specific Activities
   ii. Backdated notes: Notes: can be backdated and have a header/subject line in note
   iii. Visits
   iv. Calls: we can import, backdate, add call notes and use @mentions
   v. Appointments/Meetings: can't import meetings. The calendar integration will copy over your Gcal/Exchange meetings and bring in past meetings. If customer is concerned about historical appts from many years ago, you can always suggest importing as notes (if they're concerned about historical activity reports)
   vi. Tasks: can't backdate created date, but can backdate due date. Can import task as completed with strikethrough, but can't backdate completed date (completed date would be date of import).
   vii. Collaborators
   viii. Associated contacts (if more than 1 person and company)
   ix. Products: See API Documentation - Product Properties is the full list of fields that can be imported via the API. We can mark products active or inactive via the API, but can't bring active products to the top of the product catalog (the list is alphabetical). Inactive products will be grayed out and unclickable. Users can search for a product.
   x. Address Custom Fields
   xi. Checkbox fields
      1. Recommend using Dropdown True/False, Yes/No instead because of Import, Batch Update and Integration limitations of boolean fields.
   xii. Company Hierarchy: Parent/child relationship between Company Contacts
   xiii. Lead status field
      1. Will default load Leads to first lead status
      2. Workaround: Smart List batch actions can update 1,000 records at a time in Sell, so Import a Tag Lead Statuses and then bulk update / remove Tag manually
   xiv. Lead Unqualified Reason/s
   xv. Deal Unqualified Reason/s
   xvi. Deal Lost Reason/s
   xvii. Customer Status field

xviii. Prospect Status field
xix. Deal Win Likelihood field
xx. Deal Value Currency field (if <> Account Setting)
xxi. Shipping Address
xxii. Billing Address

c. **Misc. optional Tech Support tickets**
    i. Blacklist company email domain
    ii. Delete merge notes (*if you're doing multiple data loads)
    iii. Industry field sync from standard Industry field on leads and deals to Industry CF on deals (have to create Industry CF on Deals) -- info here

d. **Beta functionality that you can ask Sell Advocacy to turn-on:**
    i. Exchange calendar

e. **Beta functionality that you can ask Sell Product to turn-on:**
    i. US/Canada State dropdown (instead of free text State field)
        1. Only available for US/Canada and not supported on Mobile
    ii. Forecasted Sales Report enhancement where Closed Deals will no longer take into account Likelihood to Win field for forecasting

4. **Importing**
    a. At this point, the data cleanup effort is complete and we've received the final files to be imported. Basics of importing can be found in our Knowledge Base.
    b. **Data Import Process/Checklist:**
        i. Double/triple check final account configuration.
        ii. Make sure all dropdown and multi-select options in your configuration match the values in your data
        iii. Double/triple check that all formatting is still in tact. If not, correct this now in Excel before splitting up into separate CSV files.
        iv. Setup Duplication Management Settings (specific to front-end importer)
        v. Recommended Sequence: Have 4 separate CSV files per pipeline (import company and people contacts separately). First import a sample of each file and check that it imported correctly
            1. Leads
            2. Company Contacts
            3. People Contacts - also include all the fields that comprise a unique Company based on Deduplication rules (i.e. Name, skype (if stand in for unique ID))
            4. Contacts & Deals - also include Company Name, First Name and Last Name (or whatever the unique ID of the Primary Contact on the Deal should be)
        vi. Can map certain fields during import process (recommended practice for larger Impls is to complete this mapping in the Data transformation template -- so you don't need to do any manual mapping during the Import -- as manual mappings leave you open to error)
            1. E.g. Owner, Source, Deal Stage, Industry

vii. Cannot import lead data to lead statuses
    1. Defaults to New status, so need to bulk update to “Working” in a Lead Smart List
viii. To import Deal Close Date, map to “Move to stage date” with Deal Stage = WON
    1. Since these deals will be in a closed deal stage, “Move to stage date” converts into Close Date upon import
ix. Split into files of 5-10K records to import

c. **Tips and tricks to ensure all data was successfully imported (validation)**
    i. Reconcile record counts - for each object type, confirm that the number of records in Sell is consistent with the number of records in the import file
    ii. If you are importing multiple files for each object type - use tags to count (NZ)
    iii. If doesn’t match:
        1. look for merge notes
        2. if have unique identifier for records (use a de-dup field like Skype to hold this), export file and do a look-up to see what doesn’t match
    iv. Qualitative sampling - for each object type, review the detailed fields to confirm that the values are consistent with what was mapped in the import file
    v. Create a smart list with imported fields, export, and use Excel functions to compare the import vs the export (NZ)
    vi. If file has accents/foreign language > Open & work in Google Sheets > Once completed, Download as .csv then import directly, DO NOT open file (JN)
    vii. Excel: https://getbase.atlassian.net/wiki/spaces/AM/pages/187007549/Excel+Formulas
    viii. **Misc. Best Practices**
        1. Final run through / signoff after the data migration BEFORE Go-live date is preferred

FAQs:

1. **Question: If you delete all data manually, does anything remain in the activity feed? If so, what?**
    - Deleted: Notes, Logged Calls, Completed Tasks, Collaborations, Leads, Contacts, Deals, Logged Calls that were imported but no changes were made to the object type
    - Remains on Activity Feed: Appointments and Visits, Lead Status changes, Lead conversion, Lead conversion Activities, Inbound Calls to Voice number
2. **What does Sell Revert Import feature do?**
    - When Reverting an import, Sell only deletes newly created records

- Anything that was merged doesn’t revert
- Any values that were updated will not be reverted