

# Salesforce Data Migration Checklist

The following checklist distills the full Salesforce data migration process into a concise, actionable reference.

## Step 1: Plan and Prepare for Your Salesforce Data Migration

- Define migration scope and strategy:** Determine exactly which data will move and how it supports Salesforce workflows, choosing a one-time, phased, or coexistence rollout.
- Assess and cleanse source data:** Profile, standardize, and deduplicate records so only accurate, business-ready data reaches Salesforce.
- Select and configure ETL or integration tools:** Choose tooling that matches volume and complexity, and confirm secure authentication, API access, and logging.
- Map fields and assign External IDs:** Align every source field to its Salesforce equivalent and maintain referential integrity during and after the migration.
- Back up and verify source data:** Create and test a restorable snapshot so any issue can be quickly reversed without disrupting operations.

## Step 2: Execute and Optimize the Salesforce Data Migration

- Run test migrations in sandbox environments:** Validate formatting, relationships, security visibility, and performance with representative data before scaling up.
- Execute the final production load:** Migrate in waves using Bulk API options appropriately, verifying critical dashboards and relationships after each batch.
- Monitor and optimize production performance:** Track API limits, automations, and error patterns to prevent cascading failures in real time.

## Step 3: Validate and Operationalize Your Salesforce Data

- Reconcile and verify data integrity:** Confirm that all records, relationships, and ownership rules match business expectations through reports and comparison audits.
- Document rollback and recovery procedures:** Retain backups, logs, and decisions so any batch can be restored safely and with full traceability.
- Train users and collect feedback:** Enable confident adoption and surface usability issues quickly through UAT and post-launch champion support.
- Schedule governance and data-quality reviews:** Maintain ongoing trust with recurring audits, automated monitoring, and version-controlled mapping updates.