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Data Migration Checklist for Dynamics 365



Introduction

Data migration is one of the most critical and challenging phases of a Dynamics 365 implementation. A successful migration ensures users trust the system and can act on accurate data from day one. A poor migration can erode confidence, create compliance risks, and cause costly rework.

This guide provides practical steps, expert insights, and a comprehensive checklist to help you plan and execute a smooth transition.

83% of data migration projects either fail or exceed their budgets and schedules.

30 - 50% reduction in post-go-live issues, achieved by organizations that follow structured migration practices

65% clients report adoption increases when users trust migrated data





01

Pre-Migration Planning

Goal

Define scope, ownership, and expectations before any data is moved.

6

Key Steps: Pre-Migration Planning



Identify all source systems

Including legacy CRMs, ERPs, finance tools, and spreadsheets.



Define the scope

Specify what data will be moved: Master data (accounts, contacts), Transactional data (orders, invoices), Historical records (archives or legacy exports).



Assign Data Owners

Identify key Subject Matter Experts and owners responsible for data validation and sign-off.



Establish Success Criteria

Set measurable outcomes, e.g. “95% of active accounts migrated with zero orphaned contacts.”



Plan the Migration Phases

Sandbox → UAT → Production, along with governance milestones.



Document System Dependencies

Map integrations between systems and note data flow dependencies.

Common Pitfalls



01 Underestimating complexity and time required for field mapping.

02 Lack of clear ownership for data validation and approval.

03 Missing metadata or undocumented legacy fields that break downstream relationships.



Elantis Pro Tip:

Treat migration planning as a project in itself, not a task at the end of implementation. Early involvement of business data owners dramatically reduces rework later.

02 Data Assessment and Cleansing



Goal

Ensure only accurate, complete, and usable data enters Dynamics 365.

6 Key Steps: Data Assessment and Cleansing



Identify Issues

Export representative data samples to spot duplicates, blanks, and invalid formats.



Standardize Naming

Ensure consistent terminology across systems.



Normalize Addresses

Use postal standards (Canada Post, USPS).



Remove Irrelevant Records

Exclude inactive or obsolete data.



Align Formats

Standardize dates, currencies, and lookup values.



Validate Compliance

Confirm data meets business and regulatory needs.



Common Pitfalls



- 01 Migrating dirty data without profiling first.
- 02 Inconsistent standards across business units or geographies.
- 03 Overlooking special characters, legacy encodings, or unsupported formats.



Elantis Pro Tip:

Use Power Query or Power BI profiling tools to evaluate data before extraction. This helps reveal structural issues early and supports informed cleanup decisions.

03

Field Mapping and Transformation



Goal

Align legacy data structures with the Dynamics 365 data model.

5 Key Steps: Field Mapping and Transformation



Field Mapping

Create detailed field mapping for each entity (e.g., Accounts, Contacts, Opportunities).



Transformation Logic

Define transformation logic for each mapping (e.g., “Status = Active → StateCode = 0”).



Legacy Fields

Identify legacy fields with no direct equivalent in Dynamics 365 and decide to drop, archive, or recreate as custom fields.



Picklist Alignment

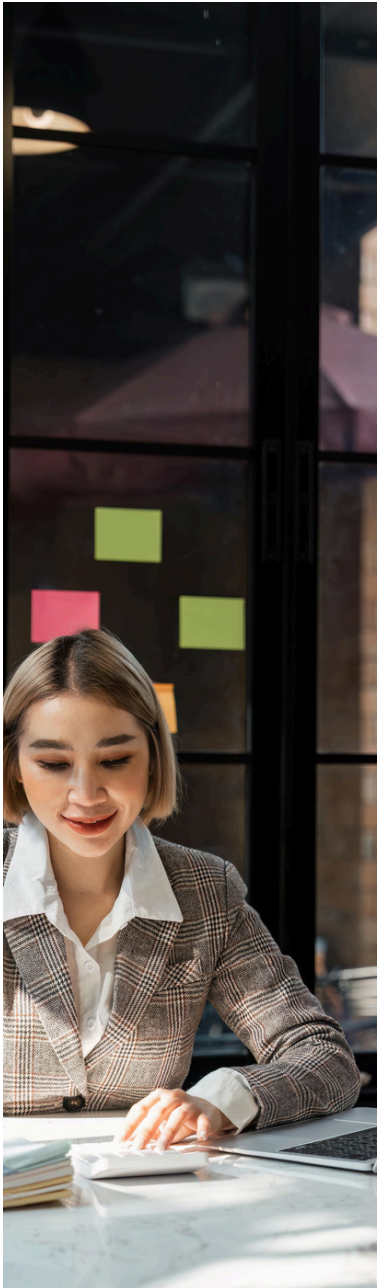
Align picklists and option sets to ensure referential integrity.



Default Values

Define default values for mandatory Dynamics fields not present in the source.

Common Pitfalls



01 Missing mappings for mandatory fields that block data imports.

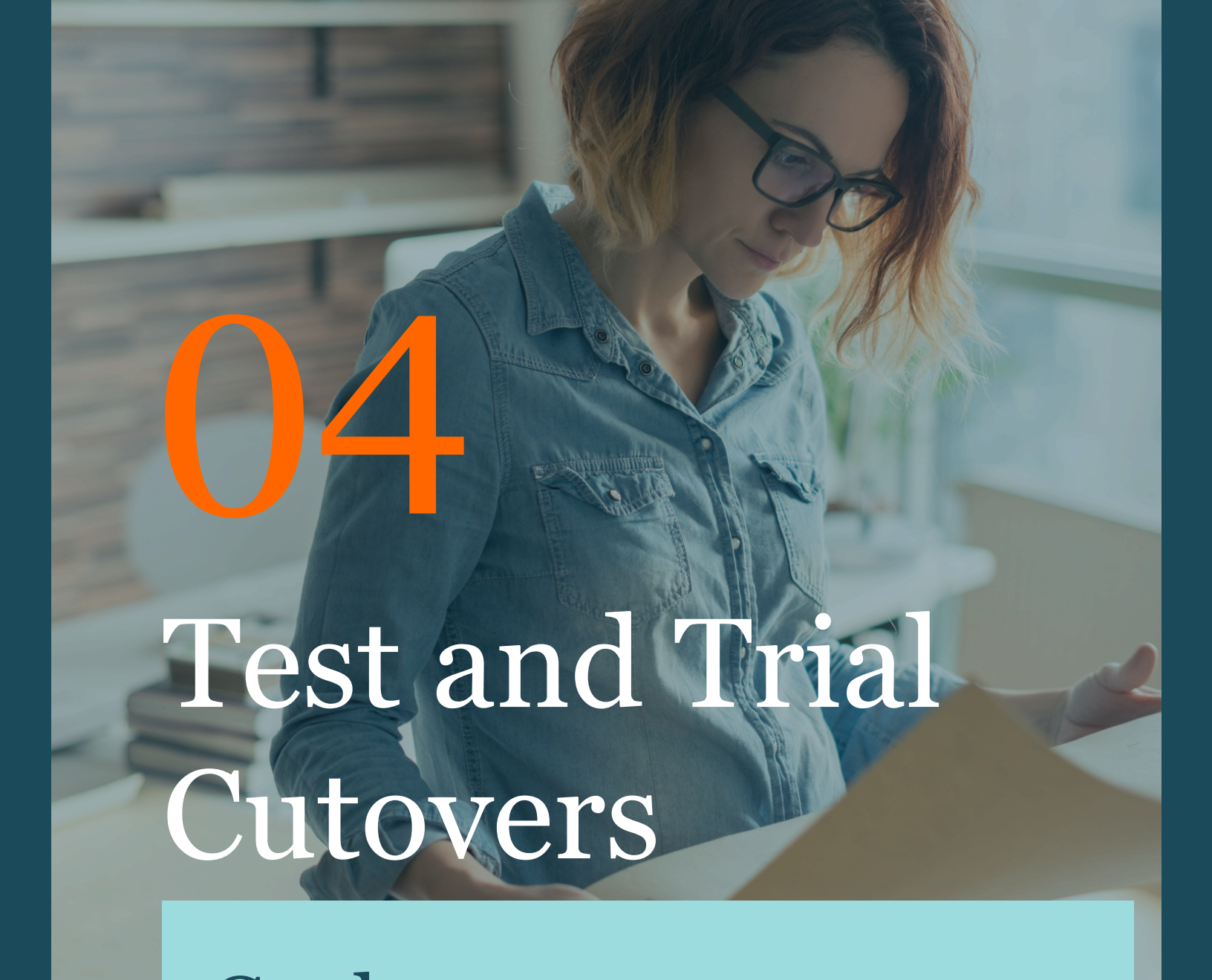
02 Overlooking user ownership or security role mappings.

03 Misaligned option sets that lead to data truncation or mismatched values.



Elantis Pro Tip:

Maintain your mapping document as a controlled artifact in version control. It becomes a reusable template for future migrations or audits.



04

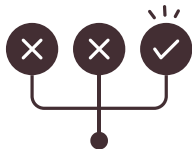
Test and Trial Cutovers

Goal

Validate the migration process before production to reduce risk and downtime.

5

Key Steps: Test and Trial Cutovers



Trial Migration

Conduct trial migrations in sandbox or UAT environments.



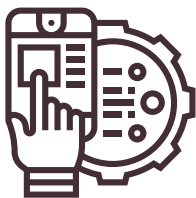
Validate Data

Validate record counts, accuracy, and relationships (e.g., Accounts to Contacts).



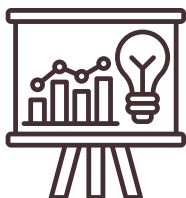
Test Performance

Test import performance and monitor for API throttling.



User Testing

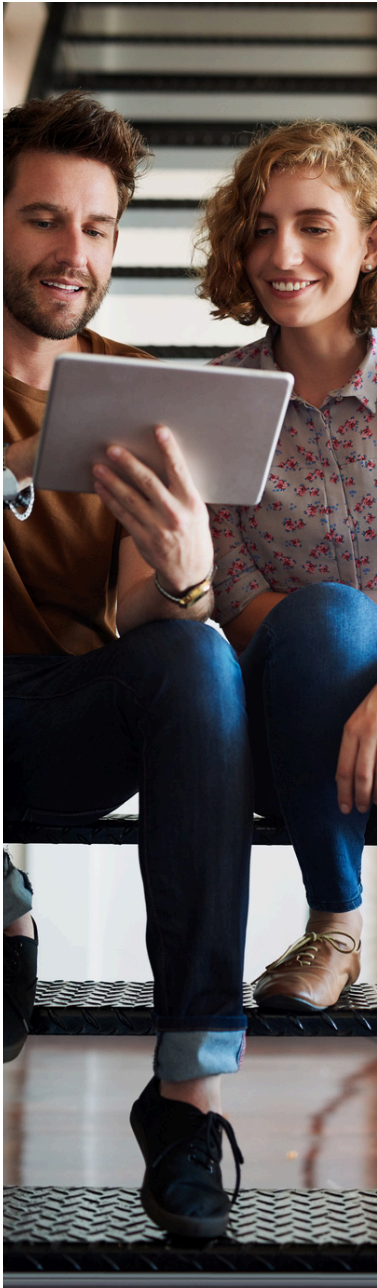
Involve business users to confirm usability and report accuracy.



Capture Insights

Record time taken, performance metrics, and issues for each iteration.

Common Pitfalls



- 01 Skipping UAT and relying on technical validation only.
- 02 Overlooking relational dependencies, resulting in orphaned records.
- 03 No rollback strategy if a test migration fails.



Elantis Pro Tip:

Adopt a delta migration strategy, move static data first, then load active transactional data closer to cutover for minimal disruption.

05 Cutover and Go-Live



Goal

Execute the final migration with precision and minimal downtime.

6 Key Steps: Cutover and Go-Live



Freeze Legacy Systems

Freeze updates to legacy systems 24–48 hours before migration.



Final Migration Run

Run final migration using validated and version-controlled scripts.



Verify Record Counts

Verify record counts between source and Dynamics 365.



Post-Migration Validation

Run post-migration validation and reconciliation reports.



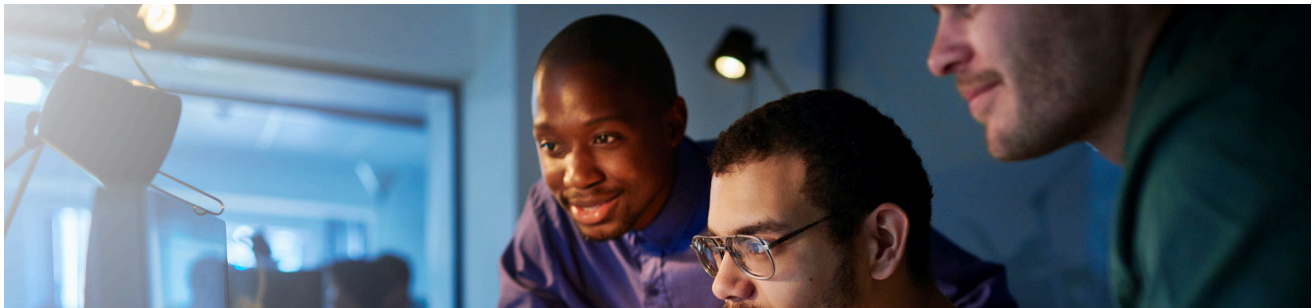
Communicate Cutover

Communicate the cutover schedule clearly to all stakeholders.



Monitor Performance

Monitor post-migration performance and user feedback.



Common Pitfalls



01 Inadequate communication causing users to edit frozen data.

02 Workflows or automations re-triggering on imported data.

03 No contingency plan if the migration exceeds the planned window.



Elantis Pro Tip:

Disable background workflows, plugins, and Power Automate flows during cutover to prevent unwanted triggers and cascading updates.

06

Post-Migration Validation

Goal

Confirm accuracy,
restore confidence,
and ensure business
continuity.

5 Key Steps: Post-Migration Validation



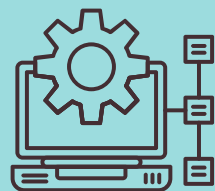
Reconcile Data

Reconcile record counts and entity relationships.



Validate Reports

Validate business-critical reports such as pipelines and invoices.



Verify Integrations

Confirm that integrations with Outlook, Power BI, and third-party systems work correctly.



User Confirmation

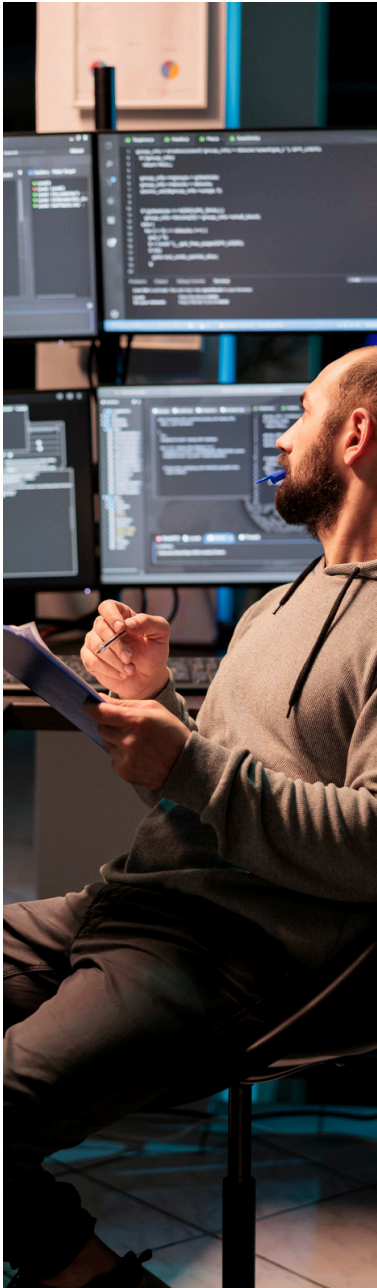
Conduct user acceptance sessions for confirmation of data accuracy.



Archive for Compliance

Archive mapping documents, scripts, and logs for compliance.

Common Pitfalls



- 01 Ignoring post-go-live monitoring and assuming success after import.
- 02 Failing to document validation evidence for audits.
- 03 Missing post-load cleanup activities for temporary or staging data.



Elantis Pro Tip:

Perform post-go-live reviews within the first week. Early feedback prevents small data errors from growing into systemic issues.

Continuous Improvement

- ✎ Institutionalize lessons learned and strengthen data governance for the future.

After migration, focus on sustainability. **Document lessons learned, standardize mapping and validation processes, and automate data quality checks using tools like Power Automate or Azure Data Factory.** Embed data governance into regular system maintenance to ensure ongoing accuracy and reliability.

Common pitfalls include treating migration as a one-time task, lacking clear ownership for data quality, and failing to document key lessons for future projects. Avoid these to maintain long-term data integrity and continuous improvement.





Ready to Migrate with Confidence?

Elantis helps organizations modernize and migrate to Dynamics 365 with accuracy, transparency, and confidence.

Our experts guide you from early planning to post-go-live validation with proven frameworks and deep Microsoft expertise.

➤ Request your free migration quote today!

✉ info@elantis.com

🌐 www.elantis.com

🌐 [@elantisinc](https://www.linkedin.com/company/elantisinc)

Bonus: Final Data



Migration Checklist

1. Pre-migration assessment

- ☐ Identify business goals and success criteria (KPIs, tolerances, SLA for downtime)
- ☐ Inventory source systems (CSV/DB/ERP/Legacy EDRMS/Custom apps)
- ☐ Identify data owners and SME contacts
- ☐ Classify data by sensitivity, retention, and regulatory needs
- ☐ Decide target environment(s): sandbox(s), production, and intermediate staging

2. Data discovery & profiling

- ☐ Extract sample datasets for each source system
- ☐ Profile data: uniqueness, nulls, invalid formats, referential integrity issues
- ☐ Detect duplicates and near-duplicates (name, email, account id)
- ☐ Identify lookup & relationship fields (parent/child records)
- ☐ Document data volumes and estimated time to migrate

Bonus: Final Data



Migration Checklist

3. Mapping & transformation

- ☐ Create field-to-field mapping (source → target) with examples for each mapping
- ☐ Define required transformations (date formats, code-to-text lookups, name parsing)
- ☐ Decide how to handle legacy custom fields and deprecated attributes
- ☐ Map security and ownership (users, teams, business units)
- ☐ Document default values and rules for missing/invalid data

4. Data cleansing & enrichment

- ☐ Run automated cleanses: normalize addresses, phone formats, remove obvious invalids
- ☐ Resolve duplicates using business rules (master record selection)
- ☐ Enrich missing critical fields where possible (e.g., country codes)
- ☐ Apply sensitivity masking for PII during non-production migrations

Bonus: Final Data



Migration Checklist

5. Migration tooling & approach

- ☐ Choose migration tool(s): Data Import Wizard, Dataflows, KingswaySoft, Scribe, Azure Data Factory, custom ETL scripts
- ☐ Define migration strategy: big-bang vs incremental vs hybrid
- ☐ Prepare scripts and packages; store them in version control
- ☐ Build a staging area for transformation and validation
- ☐ Secure service accounts and credentials; rotate after cutover

6. Test migrations (iterative)

- ☐ Run at least one full test migration into a non-prod environment
- ☐ Validate referential integrity and lookups after load
- ☐ Run performance tests: large batch imports, API throttling checks
- ☐ Conduct UAT with business users focused on data accuracy and workflows
- ☐ Track and log errors; iterate on mapping/transformations

Bonus: Final Data



Migration Checklist

7. Cutover planning & runbook

- ☐ Create a detailed cutover runbook with timestamps and responsibilities
- ☐ Schedule maintenance window and communicate to stakeholders
- ☐ Freeze source data if performing a near real-time cutover (define freeze rules)
- ☐ Prepare rollback plan and data snapshots/backup points
- ☐ Assign an escalation path (contacts, severity levels)

8. Test migrations (iterative)

- ☐ Sanity-check counts (record totals by entity) — compare pre/post migration
- ☐ Validate critical business processes: sales orders, invoices, case resolution flows
- ☐ Verify user access, security roles, and team ownership
- ☐ Confirm integrations are functioning (incoming/outgoing messages)
- ☐ Confirm audit logs and telemetry collection are enabled

Bonus: Final Data



Migration Checklist

9. Post-migration operations

- ☐ Monitor error logs and failed integrations for 7–14 days
- ☐ Run targeted reconciliations for financial and regulatory data
- ☐ Collect user feedback and triage data issues to owners
- ☐ Schedule final environment cleanup (remove staging accounts, rotate creds)
- ☐ Archive migration packages and runbooks in the project repository

10. Sign-off & retrospective

- ☐ Business sign-off against defined KPIs and acceptance criteria
- ☐ Technical sign-off: security, integrations, backups confirmed
- ☐ Conduct a lessons-learned retro and document follow-up tasks

