

SalesAgility



## Case Study

ACT! to SuiteCRM Migration



CASE STUDY

# ACT! to SuiteCRM Migration

**CUSTOMER NAME:**

Not available. This is a real case study, and the customer agreed upon an anonymous case study.

**CUSTOMER DETAILS:**

Business Intelligence provider

**ORGANISATION TYPE:**

Privately Held

**EMPLOYEES:**

10 - 25 Employees

**SUMMARY OF KEY BENEFITS:**

- Moved to a stable CRM.
- All data available to sales agents at any time, and at any location.
- Lower costs.

## Summary of Aims

The client from this case study is a leading supplier of business intelligence to the global energy industry. They produce weekly publications covering renewable energy, oil and gas, unconventional resources, LNG, power, petrochemicals and the carbon market. The client provides high-level commentary and analysis on developments in Africa, Asia, Europe, the Middle East, Latin America, North America, Russia and the rest of the CIS.

Key items for implementation:

- Move data over from ACT! to SuiteCRM
- Make data available to sales users whilst they are on the road

## The Challenge

The client used an ACT! database which held contact record information, their activity history and the subscription groups those contacts belonged too. Users experienced a large number of pain points with using ACT!, and the system was seen as unstable. The client quickly wanted to move to another platform and found in SuiteCRM the perfect replacement.

The following data was inside their ACT! database:

	# Records
Accounts	24,000
Contacts	60,000
Prospects	12,000
Prospect List	21
Notes	750,000

## The Solution

The client was impressed with the functionality of SuiteCRM and wanted to migrate their data to SuiteCRM as quickly as possible.

The first step was understanding the data. SalesAgility analysed the data set and created a

schema matching the ACT! data entities and fields to respective SuiteCRM counterparts.

Using sections of the routine that previously existed, we were able to get the data out of ACT! and into four separate Access Databases; Contacts, Accounts, Groups and Notes. SalesAgility then converted these Access databases into a delimiter separated value file (dsv).

Once in a dsv format, SalesAgility transformed the data into the SuiteCRM schema.

After a successful test migration the data was successfully migrated into a live environment.

## About SuiteCRM

SuiteCRM is the world's most popular open source CRM with over 900.000 downloads and an estimated 4.5 million users world wide.

Key features include sales, marketing and service modules. SalesAgility is the driving force behind SuiteCRM and the logical option for enterprises and organisations looking for professional SuiteCRM services, such as migrations, consulting or training.

SalesAgility also offer with SuiteASSURED a total care package for SuiteCRM.

For more info, as well as a free demo, check out: [www.suitecrm.com](http://www.suitecrm.com)