OptimalData

13 Key Data Migration Questions for NetSuite Go-Live

Is Your Client's Go-Live Date at Risk Due to Data Migration?

One of the most common reasons NetSuite go-live dates get pushed back is an underestimation of the effort required for data migration.

Clients often assume that migrating historical data is a simple export-import task when, in reality, it requires significant time for data extraction, cleaning, mapping, validation, and reconciliation.

Warning signs that data migration may delay go-live include:

- Lack of clarity on what data needs to be migrated – If stakeholders haven't identified critical historical data, last-minute decisions can cause delays.
- No assigned internal data owners – Without clear responsibility for data preparation and validation, migration tasks may fall through the cracks.
- Poor data quality in the legacy system – Duplicate records, missing data, or inconsistencies can require unexpected cleanup before migration.
- Underestimation of testing requirements – If data reconciliation is not properly planned, unexpected errors can surface during user acceptance testing (UAT), requiring rework.
- Competing priorities for the internal team – If key team members are spread thin, data migration efforts may not get the attention they need.

Data Migration is Our Business. Need Help? Contact Us!

Data migration is a key consideration in any NetSuite implementation. These questions will help uncover the prospect's needs, remove objections, and accelerate the sales process.

For more information or pricing inquiries, contact **Paul Giese at OptimalData Consulting**: paul@optimaldataconsulting.com. Feel free to reach out if you'd like a more in-depth document exploring this topic further.

OptimalData

13 Key Data Migration Questions for NetSuite Go-Live

13 Must-Ask Data Migration Questions at the Start of a NetSuite Project

1. **What is your current ERP or legacy system, and how does it store your financial and operational data?**
    - Understanding your legacy system helps us anticipate migration complexities and develop the best approach for transferring your data into NetSuite.
2. **Will your team need ongoing access to legacy data after go-live? If so, for how long and for what purposes?**
    - This helps us determine the best strategy for migrating historical data versus maintaining access to the legacy system.
3. **How many legal entities or subsidiaries are involved, and how do you currently handle intercompany transactions?**
    - We need to assess how your multi-entity structure will impact data migration and financial reporting in NetSuite.
4. **Are there any compliance, audit, or regulatory requirements that dictate how much historical data needs to be available in NetSuite?**
    - This ensures we align the migration approach with your industry's legal and financial reporting obligations.
5. **Which reports and business processes rely on historical data, and how will missing historical data impact daily operations?**
    - We need to ensure that the necessary historical data is available for your reporting and decision-making needs.
6. **Who on your team will be responsible for validating and signing off on the migrated data?**
    - Having clear data validation roles prevents last-minute delays and ensures accurate data is in place before go-live.
7. **Has your team migrated data to a new system before? If so, what were the biggest challenges?**
    - Understanding past experiences helps us proactively address potential risks and provide appropriate guidance.

Paul Giese | paul@optimaldataconsulting.com | (617) 645-6100 | www.optimaldataconsulting.com

13 Must-Ask Data Migration Questions at the Start of a NetSuite Project

8. **What is the estimated volume of transactions you expect to migrate, and which types of transactions are critical to your business?**
    - Knowing this helps us determine the migration strategy and assess performance impacts on NetSuite.
9. **Which other business systems (e.g., CRM, billing, inventory management) will need to integrate with NetSuite, and how do they currently store data?**
    - We want to ensure that data consistency is maintained across all integrated systems during and after migration.
10. **Are you planning any changes to your chart of accounts, segment structure, or business classifications as part of this implementation?**
    - If so, we'll need to map and transform historical data accordingly to ensure a seamless transition.
11. **What historical data do you need available in NetSuite to continue day-to-day operations post-go-live?**
    - This helps us determine whether to migrate detailed transactions, summarized balances, or specific records.
12. **How will data quality be ensured before migration? Are there known data inconsistencies, duplicates, or missing records?**
    - Addressing data issues in advance prevents reconciliation challenges after go-live.
13. **What internal resources will be dedicated to preparing, cleaning, and validating the data for migration?**
    - Ensuring the right people are involved early in the process helps us keep the migration on track without delaying go-live.

Paul Giese | paul@optimaldataconsulting.com | (617) 645-6100 | www.optimaldataconsulting.com