



13 Data Migration Questions When Selling NetSuite

Understanding Data Migration Motivations

Why does data migration matter? When a prospect wants to keep transactional data, understanding their motivation helps shape the conversation.

Common reasons include:

- Retaining sales history to preserve customer insights.
- Audit and compliance needs (publicly traded or IPO-bound companies).
- Fear of losing data when decommissioning a legacy system.

Here Are Three Approaches to Data Migration

1. **Summary Trial Balances & Open Transactions** – Standard approach; loads high-level financial data.
 - **Pros:** Simple, fast, familiar for accountants.
 - **Cons:** No historical sales data; requires access to the old system.
2. **Sales History Import** – Brings in closed sales transactions.
 - **Pros:** Preserves sales insights; reduces complexity.
 - **Cons:** Can complicate reconciliation.
3. **Detailed Transactions** – Recreates historical transactions in NetSuite.
 - **Pros:** Full reporting continuity.
 - **Cons:** Expensive, time-consuming, high-risk for mismatches.

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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.

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13 Key Data Migration Questions To Ask Prospects

1. What is your legacy system?

- Determines complexity, cost, and feasibility of migration.

2. Do you need access to legacy data post go-live?

- Helps assess if migration outweighs read-only license costs.

3. How many subsidiaries (legal entities) do you have?

- Impacts migration effort and intercompany reporting.

4. Are you a publicly traded company?

- SOX compliance may require extensive historical data migration.

5. Are you planning an IPO or private capital raise?

- Requires 3+ years of historical data for financial reporting.

6. Is your accounting system also your customer data source?

- Determines if CRM data integration is needed.

7. What is your approximate transaction volume?

- Affects migration cost and strategy.

8. Are there regulatory requirements to retain historical data?

- Industry and location-based regulations may dictate retention policies.

9. Has your team transferred legacy data before?

- Identifies potential challenges with data formatting and cleaning.

10. Has anyone on your team implemented an ERP before?

- Experience level influences data preparation complexity.

11. What current software tools will you continue using?

- Ensures proper integration planning post-migration.

12. Will you change your segment structure in NetSuite?

- Restructuring accounts or departments affects migration mapping.

13. What is your budget for data migration?

- Helps align expectations and tailor solutions accordingly.