Redtail Migration Readiness Assessment

A 5-minute self-assessment to see if your firm's data, integrations, and team are ready to move to Salesforce.

1. Data Readiness

Before any migration begins, know the true condition of your Redtail data.

- Do you have a current record count for contacts, opportunities, and notes in Redtail?
- Have you identified duplicate or stale records that should be cleaned up before migration, not after?
- Are custom fields and tags mapped to an equivalent Salesforce field, or will they need a new home?
- Is your document and note history (especially compliance-relevant notes) exportable in a structured format?

2. Integration Continuity

Redtail rarely runs alone. Every connected tool is a dependency that needs a migration plan of its own.

- List every system currently integrated with Redtail (custodians, financial planning tools, document management, email/calendar sync).
- For each integration, confirm whether a native Salesforce or FSC connector already exists.
- Identify any integration that will need to run in parallel during a transition window, and for how long.
- Flag any integration owned by a vendor contract that has its own notice period or migration fee.

3. Team Readiness

Technology migrations succeed or fail on adoption. Assess your team honestly.

- Who on your team will serve as the migration's internal champion?
- Has your team used Salesforce or FSC before, even at another firm?
- Is there a quiet period (post-tax season, post year-end) where a cutover would cause the least disruption?
- Who needs hands-on training, and who can self-serve from documentation?

4. Your Blockers Framework

Score each area 1 (not ready) to 5 (fully ready). Anything scoring 3 or below is a blocker to resolve before migration, not during it.

Area	Score (1-5)	Notes
Data quality & completeness		
Integration mapping		
Team bandwidth & champion identified		
Compliance/audit trail continuity		
Timing window identified		

5. Your 30-Day Roadmap

A realistic first month, once you've cleared the blockers above.

- Week 1: Data audit and cleanup plan; confirm scope of custom fields and tags to migrate.
- Week 2: Integration inventory finalized; Salesforce/FSC environment provisioned and configured.
- Week 3: Test migration of a data subset; validate record counts, field mapping, and note history.
- Week 4: User acceptance testing with your champion; training scheduled; cutover date confirmed.

6. The Compliance Angle

Wealth management firms carry regulatory obligations that a generic CRM migration checklist won't cover.

- Redtail's compliance and audit-trail features have a Salesforce FSC equivalent, but the mapping isn't automatic; plan for it explicitly.
- Confirm your record retention requirements (SEC, FINRA, or state-specific) are preserved through the migration, not just the data.
- FSC's compliant data model is designed for regulated financial services; ask your migration partner to walk through how it closes any gaps your current Redtail setup has.

Ready to talk through your specific setup?

Book a Migration Consultation at navirum.com/contact-us-at-navirum or reply to the email that sent you this guide. No commitment, response within 24 hours.