- ■ Schedule cutover during a low-activity window (post-tax season, post year-end).
- ■ Run team training sessions, tiered by role and prior CRM experience.
- ■ Keep Redtail in read-only mode for a defined grace period as a safety net.
- ■ Check in at 2 weeks and 30 days post-cutover to catch adoption gaps early.
- ■ Decommission Redtail access once the team has fully transitioned.

At-a-Glance Timeline

Phase	Duration	Key Milestone
Data Cleanup	Weeks 1-2	Clean, mapped data set ready for migration
Integration Reconnection	Weeks 2-4	All integrations verified end-to-end
UAT	Weeks 4-5	Compliance & operations sign-off
Adoption & Rollout	Weeks 5-6+	Full team live on Salesforce/FSC

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.