

# Data Migration Checklist

We know migrating your member data from excel hell or an outdated management software can be a scary move. But, before you let this fear stop you, think about how much time (and money) you'd save by transitioning your data to a clean, workable database that integrates with your forms, membership application, event registration and tracks payment data — now that is member management done right!

To help you in your move, make sure you have all these to-do's checked off your list:

## Scrub it clean

- Remove duplicate member records
- Search for expired members (who you know won't return) and delete their record
- Skim through the database for inaccurate records — if they don't have at least basic member data of seem iffy, remove them

## Rectify the records

- Update current members' basic contact information
  - Email Address
  - Address
  - Phone Number
- Check and verify member type
- Check and verify paid-thru date

## Organize your organizations

- Set primary contact for each organization
- Set dues contact for each organization
- Check and verify current contacts associated with organization

## Beneficial or Bloated

- Analyze what data is relevant and helpful to you
- Remove any information that will bloat your database

Now that your database is clean and organized, it will be much easier to upload to a new system. If you need help along the way, reach out to our team of data migration specialist at [help@amohq.com](mailto:help@amohq.com).