



It's not you
IT'S THEM

MIGRATION GUIDE

The guide to breaking up with your CRM (and finding one you'll love)



Why the problem isn't your salespeople. It might be your CRM.

Your salespeople don't hate CRM...they hate what CRM has become.



They hate spending Friday afternoons updating opportunities instead of talking to customers.



They hate entering information that already exists somewhere else.



They hate being asked for forecast updates when everyone knows the forecast is only as accurate as the data nobody had time to enter.



And they absolutely hate hearing a new AI feature is going to change everything, only to discover it's just a chatbot on top of the same broken process.

For more than two decades, businesses have accepted an uncomfortable compromise. CRM systems promised visibility, forecasting, process consistency, and growth. In return, salespeople were expected to become part-time administrators, responsible for feeding a system that rarely gave enough value back.

It was a bad trade then and it's an even worse trade now. Because while the world around us has changed dramatically, many CRM systems haven't.

Customers leave signals everywhere: In emails. In meetings. In invoices. In support cases. In purchase history. In product usage. In conversations. In customer success interactions.

Yet most CRM systems still depend on one thing to stay current: someone remembering to update a record.

And the same is true if you don't have a CRM, only worse. If you've got a CRM-lite tool (or are using spreadsheets) those updates still happen, only in lots of siloed places.

The traditional CRM model was built around capturing (and then parroting back) information, and modern revenue organizations need something fundamentally different.

They need a system that:

- Understands information
- Connects customer interactions, revenue data, and business context
- Doesn't simply tell you what happened
- Helps you decide what to do next

That's the difference between a system of record and a system of guidance. And once you've experienced the difference, it's very difficult to go back.

If you've reached the point where your CRM (or whatever you're using instead) feels more like an obligation than an advantage, this guide is for you.

Not because starting a relationship with a new CRM is easy, but because staying in the wrong relationship is often far more expensive.

The real cost of staying together

Most organizations don't replace their CRM because of missing features. They replace it because they're no longer getting results.

The warning signs usually appear long before anyone starts evaluating alternatives:

- ❖ Salespeople stop updating opportunities
- ❖ Managers create spreadsheets to supplement reporting
- ❖ Forecast reviews become exercises in interpretation rather than analysis
- ❖ Executives lose confidence in pipeline visibility
- ❖ Customer knowledge becomes trapped inside inboxes and meeting notes

And despite increasing investments in technology, productivity doesn't improve.

The reality is that many organizations are running modern businesses on revenue systems designed for a different era. The old model assumed information had to be manually entered while the new reality is that the information already exists!

The challenge is connecting it, understanding it, and turning it into action.

That's where most CRM platforms fall short: They know what users tell them, but not what customers are actually doing.

A pipeline report can tell you what opportunities exist.

It cannot tell you which customers are likely to buy more, which accounts are at risk, which products are underutilized, or which sellers should take action today.

For that, you need more than CRM data.

- ❖ You need customer intelligence
- ❖ You need ERP data
- ❖ You need communication data
- ❖ You need AI that understands context
- ❖ You need a platform designed to help salespeople win

What changes when you move to SugarAI?

Moving to SugarAI isn't simply replacing one CRM with another; It's changing the role CRM plays in your business.

Traditional CRM		SugarAI
System of record	→	System of guidance
Data entry focused	→	Revenue outcome focused
Relies on manual updates	→	Captures insights automatically
Pipeline visibility	→	Customer intelligence
CRM-only reporting	→	CRM + ERP visibility
Reactive management	→	Proactive recommendations
AI bolted onto workflows	→	AI embedded into workflows
Users serve the system	→	The system serves users

This distinction matters because most CRM projects focus on what leadership wants while SugarAI focuses on what salespeople need. Because if salespeople don't receive value, adoption becomes a management problem.

When salespeople receive insights, recommendations, account intelligence, and guidance that helps them win more business, adoption happens naturally. The system becomes something they want to use rather than something they're required to use, and that changes everything!

The four stages of moving on

Like any major relationship change, replacing your CRM is both emotional and practical.

The journey typically follows four stages:

- 1. Breaking up:**
Reimagine success
- 2. Dating:**
Get to know your new CRM
- 3. Marriage:**
Make the commitment
- 4. Growing the family:**
Continuous innovation

Let's explore each one.



Stage 1: Breaking up Reimagine success



Before evaluating platforms, building requirements, or scheduling demonstrations, take a step back and ask a different question.

Don't ask "What features do we need?" but instead ask "What outcomes do we want?"

Too many CRM projects start with requirements, but the best CRM projects start with business value.

- ❖ Better forecast accuracy?
- ❖ Faster onboarding?
- ❖ Improved seller productivity?
- ❖ More account growth?
- ❖ Better customer retention?
- ❖ Increased win rates?
- ❖ Greater visibility into customer health?

These business outcomes should drive every decision that follows.

This is also an opportunity to challenge assumptions and stop doing the things that have made you unhappy! Many organizations unknowingly recreate the same problems every time they replace technology. They:

- ❖ Migrate old workflows
- ❖ Preserve unnecessary complexity
- ❖ Automate inefficient processes

Then they wonder why nothing changes.

This is an opportunity to not only change your CRM for the better, but your processes too. And is the perfect time to reimagine what AI should do.

Many organizations evaluate AI incorrectly. They ask "Does it have AI?" and not "How will this AI make my salespeople better?"

AI is not about generating more content; it is helping sellers make better decisions:

- ❖ Who should I call?
- ❖ Which accounts need attention?
- ❖ Where is risk emerging?
- ❖ What opportunity am I missing?
- ❖ What should I do next?

When AI answers those questions naturally, it creates value. Now that you're looking out for it, you'll see that most AI summarises and takes notes. It's reactive. You're looking for AI that is proactive and adds value.

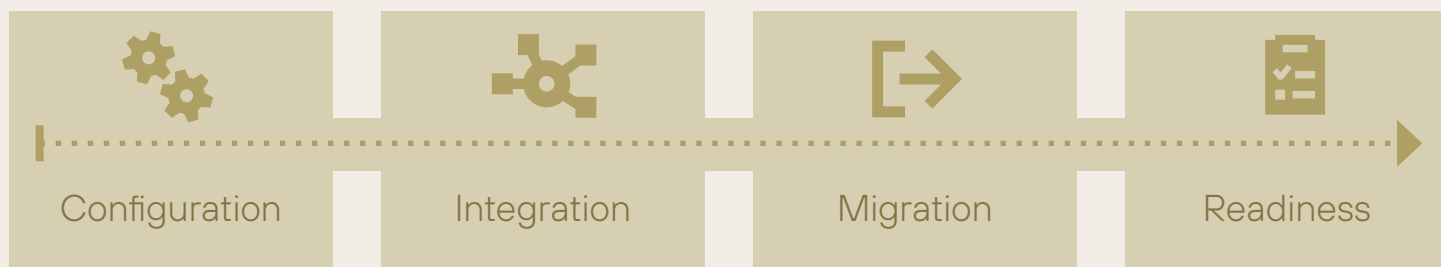
The former feels exciting the first time you use it, the latter brings out the best in you. And which one of those sounds like a life partner?

Stage 2: Dating

Get to know your new CRM

Now that you've decided what success looks like, it's time to get to know your future CRM.

This stage includes:



Think of it as learning how the relationship will work in practice.

Phase 1: Configuration – Start small, win early

One of the biggest mistakes organizations make is trying to solve everything before go-live. They attempt to perfect every process, customize every screen, automate every workflow, and integrate every system.

That's a recipe for frustration, missed expectations, and delays. After all, you don't go on honeymoon after the first date. The most successful organizations follow a crawl-walk-run approach:

Crawl

Focus on foundational capabilities

- Customer information
- Pipeline and Forecasting
- Sales Productivity
- Context from ERP (one-way integration)
- Connection to email, calendar and mobile

Walk

Expansion

- ERP full automation – lead to order
- Customer intelligence
- Account planning
- Guided Selling
- Revenue analytics

Run

Maturing and accelerating capabilities

- AI-driven recommendations
- Risk detection
- Growth opportunity identification
- Extensive workflow automation
- Advanced analytics

Momentum matters more than perfection! Early wins create confidence, confidence creates adoption, adoption creates results.

Phase 2: Integration – Connect the systems that matter – ERP and interactions

A CRM should become the place where information comes together, not another isolated source of information. This is especially true when it comes to ERP systems.

Most CRM platforms know opportunities, but ERP systems know customers:

- ❖ Purchase history
- ❖ Product usage
- ❖ Invoices
- ❖ Revenue
- ❖ Payment trends
- ❖ Buying patterns

Without ERP visibility, salespeople only see part of the story. But with ERP integration, they understand customer reality. And this is where SugarAI becomes uniquely powerful.

Rather than forcing organizations to recreate ERP functionality, SugarAI uses ERP data to create actionable intelligence. The goal isn't to replace your ERP.

The goal is to make ERP insights available and useful to revenue teams.

In addition to ERP data, Unstructured Data is your competitive advantage. Most customer knowledge isn't stored in fields; it is hidden in conversations.

- ❖ Emails
- ❖ Meeting transcripts
- ❖ Call recordings
- ❖ Customer interactions

Historically, capturing this information required salespeople to manually summarize everything and nobody enjoyed doing that. In fact, most salespeople don't do it or only do it grudgingly.

Modern CRM should learn from interactions automatically, understand context and capture signals without creating additional work.

When salespeople stop documenting and start selling, everyone wins.

Phase 3: Migration – Take the good, leave the bad

Every CRM contains valuable assets but, like any relationship, can also contain baggage. Move forward and leave the baggage behind!

Bring forward:

- ❖ Customer history
- ❖ Proven business processes
- ❖ Critical reporting requirements
- ❖ Valuable institutional knowledge

Leave behind:

- ❖ Duplicate records
- ❖ Obsolete workflows
- ❖ Unused fields
- ❖ Legacy complexity
- ❖ Customizations nobody understands

Most importantly, resist the temptation to make your new CRM look exactly like your old CRM. You didn't leave because everything was working so don't recreate the very problems you're trying to solve.

And if everything is working but you're not happy with the price, don't try to recreate your current set up elsewhere but for less. It's like ordering your favorite dish at a different restaurant. It's not going to be the same.

Phase 4: Readiness – Time to propose!

This is the moment before commitment. The system is configured, the integrations are connected, the data is ready. And now people need to be ready too:

This is the moment before commitment. The system is configured, the integrations are connected, the data is ready. And now people need to be ready too:

- ✓ Create champions throughout the process
- ✓ Train managers, stakeholders and influencers
- ✓ Enable sellers by providing multiple learning paths:
 - Live training
 - Self-paced content
 - Written documentation
 - Video enablement
 - Peer coaching

The goal is simple: No surprises.

By the time rollout arrives, people should feel prepared, confident, and excited.

Stage 3: Marriage

Make the commitment



Go-live day is where preparation becomes reality.

It's normal for people to feel nervous because change always creates uncertainty. However, if you've done the work properly, this should be a moment of excitement, not concern. The old system is behind you and the future starts now.

This is where organizations often make a critical mistake. They assume implementation is the end of the process but, like a marriage, this is just the beginning!

So how do ensure a successful marriage, err, rollout?

First, support the relationship

Successful CRM deployments don't end at launch, they intensify the support:

- ❖ Duplicate records
- ❖ Obsolete workflows
- ❖ Unused fields
- ❖ Legacy complexity
- ❖ Customizations nobody understands

Adoption is table stakes, salespeople need to want to use the system, but the outcomes are the reasons you started this journey in the first place. Never lose sight of them.

And then, measure what matters

Too many organizations measure success using login statistics alone, but that's not enough. The goal isn't usage, its impact.

Make sure to measure both adoption and outcomes:

Adoption measures

- Active users
- Engagement levels
- Feature utilization

Outcome KPIs

- Sales Cycle Time improvement
- Forecast accuracy
- Win rate improvement
- Customer retention and Account Growth
- Administrative time reduction
- Onboarding time to productivity for new salespeople

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Stage 4: Growing the family

Continuous innovation

The strongest CRM relationships get better over time. As your business evolves, your CRM should evolve too, and this is where the real value compounds.

Once the foundation exists, every improvement builds on previous success. First, “Click Less, Sell More” needs to become your guiding principle. Every enhancement should answer one question: “How do we make it easier for salespeople to sell?”

That might include:

- Guided selling
- Buying pattern recommendations and Cross-sell recommendations
- Account health insights
- Lead & Opportunity smart prioritization
- Workflow automation
- Renewal intelligence

Every change you make should reduce effort and increase effectiveness.

Second, innovation should feel natural. Many organizations think innovation requires massive projects, but it doesn’t. The best innovation often happens through modest improvements delivered consistently:

- Refine workflows
- Improve dashboards
- Expand AI recommendations
- Introduce new insights
- Remove unnecessary clicks
- Help people work smarter

Over time these changes become transformative. Remember, crawl-walk-run and continuous innovation. Not “bet the farm” and “big bang” releases. Your CRM needs to be able to grow and evolve along with your business and maturity.



Wrapping up...

Common mistakes to avoid

Before we wrap up, let's cover three common mistakes...

Overengineering too early

Don't fall into the trap of spending months, quarters, or even years perfecting a process nobody uses. Like any relationship you need to build on success and grow over time.

Define quick wins, hit them, communicate them. Repeat.

Ignoring change management

Technology doesn't drive adoption, people do. Be sure to invest in communication, enablement, and support. Provide tools to your salespeople and celebrate successes.

Treating AI like a feature

AI is not a checkbox on a requirements list. It is not a chatbot bolted onto the CRM.

Make sure that AI is delivering value by providing smart recommendations, prioritizations and next-best actions based on what the customers are doing.

Your next great revenue story starts here

Like starting a new relationship, changing CRMs can feel intimidating. But staying with a system that frustrates salespeople, limits visibility, and slows growth is far riskier.

The best CRM is one that:

- Helps your people win
- Works where they work
- Captures information automatically, surfaces insights proactively, and recommends actions intelligently

Build a long-term marriage that supports your business and grows with you.

It's the one that combines customer interactions, ERP data, AI, and revenue intelligence into a single experience.

Most importantly, it's the one that transforms CRM from a system of record into a system of guidance.

Because salespeople didn't get into sales to update software.

They got into sales to build relationships, solve problems, and drive growth.

Your CRM should help them do exactly that.

And when it does, you'll wonder why you stayed in the old relationship for so long.



Unlock sales potential

About SugarAI

SugarAI goes beyond traditional CRM to power account-first, AI-driven selling. We help sellers win and grow the accounts that matter most by uncovering hidden risk, revealing expansion opportunities, and guiding every next move for complex, relationship-driven businesses. .

Learn more at www.sugarai.com