

How to switch from Salesforce to Insightly

A comprehensive guide to switching CRMs

insightly

Contents

Contents	2
Introduction	3
Why Insightly	4
5 steps to a successful CRM switch	6
Step 1: Assess your CRM needs	7
Step 2: Clean & structure data	11
Step 3: Define roles	12
Step 4: Migrate data	13
Step 5: Review	15
Customer stories	17
Reasons to switch now	22
Next steps	24

Introduction



Whether you've already decided to leave Salesforce Sales Cloud or are just exploring options, one thing is clear—the status quo is not working. Having invested time, money, and effort, you might be wary of change, dreading the entire data migration to a new CRM and worried that it won't be as scalable or powerful as Salesforce. These are all valid concerns, and we put together this guide on switching from Salesforce to Insightly to help you navigate the decision-making and buying process with more knowledge and confidence.

Why Insightly

Built from the ground up with the latest technology, Insightly is a modern unified CRM that provides businesses of all sizes and industries with secure, flexible, and powerful sales, marketing, and delivery solutions all in one place, without the high cost and complexity of legacy CRMs, like Salesforce.

Insightly's unified approach reflects the need for modern businesses to make data-driven decisions, create consistently great customer experiences, and compete in the digital consumer age. With Insightly you can finally centralize all customer data, align teams throughout the entire customer journey, automate processes, and measure performance to make data-driven business decisions. Gain access to enterprise-grade capabilities in a much simpler, more user-friendly interface and at a fraction of the cost.

▶ Power

Insightly provides scale, flexibility, security, and powerful CRM capabilities out of the box, without the high cost of Salesforce. You can customize Insightly to your specific industry and business requirements and team preferences. Insightly uses the scale capabilities of the Amazon Web Services (AWS) platform—which is almost an infinite scale—to store extreme amounts of data and analyze them in a very fast time frame.

Vetted and approved by Gartner Inc., the #1 technology advisory firm in the world, Insightly CRM is one of only 15 vendors that Gartner includes in its annual Sales Force Automation Magic Quadrant market report alongside Salesforce, Oracle, Microsoft, and SAP.¹

▶ Transparency

Insightly's pricing is clear and straightforward. You always know what you're paying for, when, and why. No hidden costs. Most importantly, you don't need to hire expensive external consultants to help you implement Insightly and train your teams. Insightly has all the resources you need in-house to get you up and running quickly and with the fastest path to positive ROI in mind. On average, it takes half the time to set up and start using Insightly than it does to implement legacy CRMs.

In a recent customer survey, 70% of respondents reported positive ROI within the first year of implementing Insightly CRM.²

¹Gartner Magic Quadrant for Sales Force Automation 2020

²Insightly Manufacturing Customer Survey, 2019

▶ **Simplicity**

While legacy CRMs are popular, their outdated technical architecture and design philosophy requires that you almost need to be an expert in these systems to get your money's worth. By contrast, Insightly's simple and intuitive user interface (UI) requires minimal training and ramp-up time and makes it easier to integrate your CRM into every team's daily work and existing business processes.

In a recent Insightly customer survey, 57% of respondents said they considered "easy adoption and use" as a key factor in choosing Insightly and 77% reported using it daily.³

At the end of the day, it doesn't matter how powerful any system is—if its intended users don't fully adopt and incorporate it into their work, it's hard to get a high ROI.

▶ **Easy Switchover Process**

Insightly's one-click data migration tool was designed to help Salesforce power users switch systems quickly and painlessly. The tool facilitates complete, seamless migration in minutes, depending on the size of your dataset. All you have to do is export your data and share it with Insightly.

To make sure you're up and running quickly, Insightly also works with your team on a CRM needs assessment, onboarding, and user training. On average, a new Insightly customer is up and running in less than four months.

In this guide

This guide covers Insightly's recommended 5-step switchover process which ensures a smooth transition, faster implementation, and fast time to value.

Whether you follow all five steps or just glean details on Insightly's switchover process, we hope this guide will help you to prepare for your CRM switch with more confidence and clarity.

5 steps to a successful CRM switch



The Insightly Team is available for guidance and assistance at every step.

Step 1: Assess your CRM needs

Regardless of your current or past Salesforce setup and usage, conducting a CRM needs assessment will help you to decide on which data you will migrate to Insightly CRM and clarify your CRM goals in light of your overall business strategy. It will also help you to determine the scope of features and capabilities, customizations, integrations, and user preferences. Finally, CRM needs assessment can serve as a benchmark to measure your ROI after the implementation.

Decide on how you will perform your CRM needs assessment

Decide on who is going to be involved in the switchover process. Consider forming a cross-functional team that includes senior leaders along with mid-level and frontline users, so you have both big picture and daily user perspectives across different business lines.

Make sure to include current/future CRM administrators and an IT person in your CRM needs assessment taskforce. It's also helpful to have at least a couple of outside-the-box thinkers on the team.

While you need a cross-functional team to collect feedback and execute the plan, you also need someone who will rally the troops, hold everyone accountable, and ensure successful delivery, i.e. someone who will own the project. This might be your lead IT resource, a sales leader, or data and operations manager.

When selecting a project owner, look for someone who is detail-oriented but also understands the bigger picture and is a good communicator.



Determine your CRM goals

Defining your CRM goals has less to do with features and more to do with outcomes. Use these goals to foster greater alignment among stakeholders and focus on and measure what matters the most to your business.

You can get as specific as it makes sense for your business and use a familiar framework like SMART (Specific, Measurable, Achievable, Relevant and Time-based). Work with an Insightly rep to assess your CRM goals and plan the entire switchover process from there.

Set specific benchmarks that make the most sense for your business and business stage. For example: achieve a 90% MQL-to-SQL ratio, lower new customer acquisition costs by 5% in six months, reduce annual operational costs by 15%, and/or grow annual revenue by 20%.



Collect & analyze feedback

Put together a plan for soliciting feedback from across the organization. You'll probably get a mix of detailed and brief responses. For a more data-driven approach, design a brief survey that addresses the common pain points, such as disorganized information, poor client and supplier management, inefficient collaboration with team members, and difficulty managing projects.

As you collect feedback and begin to analyze the data, you might notice a few common threads. Consider using the following categories to group ideas, issues, and feature requests: important features, cost and licensing, scalability, integrations, and support.



Create a needs checklist

Use the team feedback and your business and CRM goals to create a CRM needs checklist. Your list can include must-have CRM features and capabilities, cost, and other factors.

Here is a checklist example:



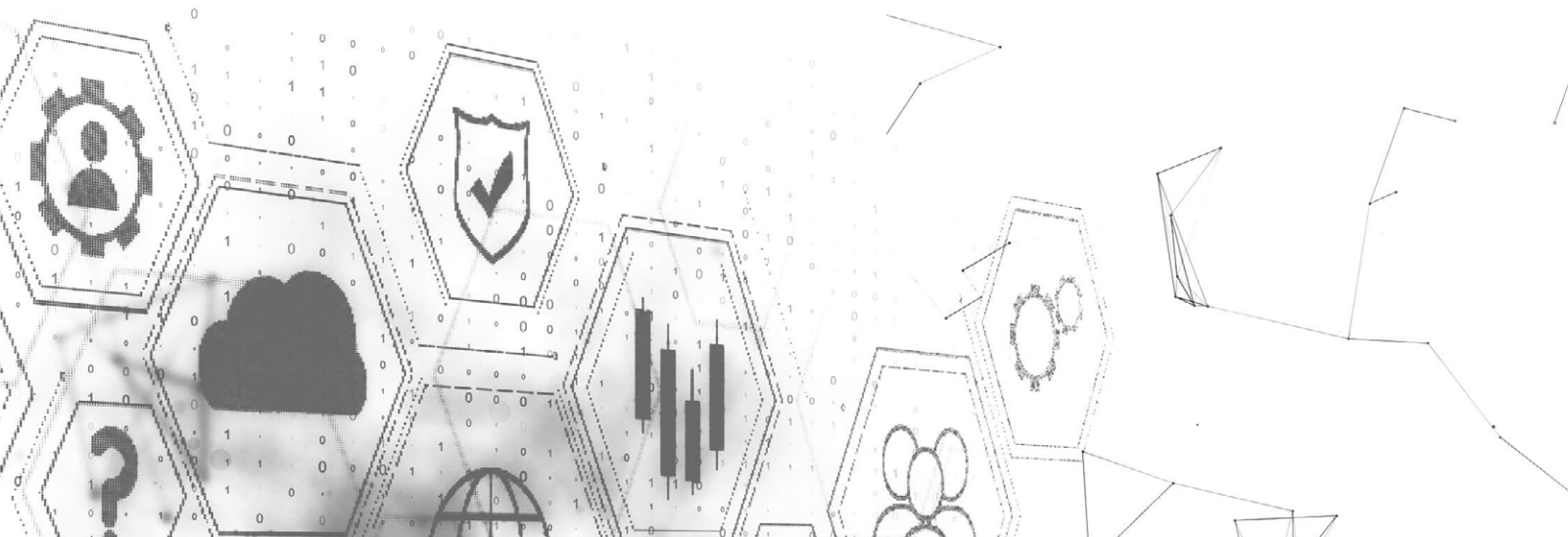
- ✓ Contact management
- ✓ Sales automation must-haves (product and price catalogs, quote books, territory management, etc.)
- ✓ Marketing automation must-haves (campaign management, email marketing, lead scoring, etc.)
- ✓ Lead management
- ✓ Project management
- ✓ Workflow automation
- ✓ Integrations
- ✓ Customer data management
- ✓ Data analytics and reporting
- ✓ Customizations
- ✓ Mobile CRM
- ✓ Security
- ✓ Data transfer/switchover management
- ✓ User training and ongoing support
- ✓ Implementation requirements
- ✓ Total cost of ownership

Step 2: Clean & structure data

Insightly CRM is your opportunity to start fresh and leave the junk behind. Bad data creeps in over time. Common examples of bad data include duplicate records, unused custom fields, overlapping tags, confusing dropdown menus, and various hacks/workarounds.

Before switching from Salesforce to Insightly, challenge your team to identify only those records, fields, and objects that are truly needed. You can always save the “extras” in a CSV file, in case someone needs that data later.

You can easily clean your data in Insightly CRM, but it’s best to start with a clean slate. Taking a somewhat minimalist and deliberate approach could offer additional clarity, reduce confusion, and expedite CRM success.



Step 3: Define roles

To ensure ongoing data integrity, define user roles and assign user permissions accordingly. Identify your 'administrators' with advanced permissions and visibility and regular users with limited or simple permissions.

Start with a simple hierarchy of roles and reporting and assign user permissions based on roles and scope of usage. While you can transfer all user data from Salesforce to Insightly CRM, you'll need to set up a new hierarchy of roles in Insightly CRM. Just keep a record of the hierarchy so that we can replicate these in the Insightly instance. Or if you'd prefer, define new

ones because moving to a new CRM is a great time to rethink these important considerations.

Remember to audit user roles and permissions on a regular basis, as users can be a major cause of data integrity issues. Errant data uploads, accidental record deletions, and bad habits can quickly erode the reliability of your customer data.

As with any company-wide initiative, maintaining data integrity should be hardwired into your organization's way of doing things. Here are a few ways to infuse data integrity best practices into your company culture:

1. Limit user access to only the systems and permissions they need to perform their jobs
2. Create work instructions and operating procedures for collecting and modifying data
3. Use out-of-the-box system functionality and limit custom fields whenever possible
4. Integrate data integrity into your onboarding process for new hires
5. Establish clearly defined roles so everyone knows who is in charge of data uploads and integrations
6. Regularly solicit feedback from users to understand their data challenges
7. Make it easy for users to request custom BI dashboards and reports (if they are not permitted to build their own)
8. Identify and monitor data integrity metrics to proactively resolve issues
9. Appoint a data integrity manager, who will own data integrity at your organization

Step 4: Migrate data



When it comes to migrating data, all you need to do is export your Salesforce data and provide Insightly with access to your exported files. Insightly takes care of the rest.

Just send us your master data file and the Insightly team will use our proprietary Salesforce data migration tool to transfer all data for all fields from all standard objects, including:

- ▶ Calendars
- ▶ Tasks and events
- ▶ Emails and notes
- ▶ Leads
- ▶ Accounts
- ▶ Users and roles
- ▶ Contacts and Opportunities

But we don't stop there. Most implementations of Salesforce have dozens of custom objects that are built for the specific needs of their business. Insightly can handle all of them.

How the data migration process works

The Salesforce-to-Insightly migration tool imports exported Salesforce data into Insightly. You don't have to import the data manually or do any mapping. The migration tool does all the hard work for you so you can have a smooth transition from Salesforce into Insightly.

Our Professional Services team uses the migration tool to create a brand new Insightly account for your business based on your Salesforce data. Once your data is imported into your new Insightly account, our Professional Services team will schedule a call with your Insightly administrator to walk through the new account, share best practices, and discuss any concerns you may have.

Our team takes great measures to preserve all existing data relationships you have in Salesforce and migrates your data over with high fidelity. For example, we check for duplicates to make sure your lead statuses and other metadata from Salesforce are not already default values within Insightly.



Here are a few system requirements:

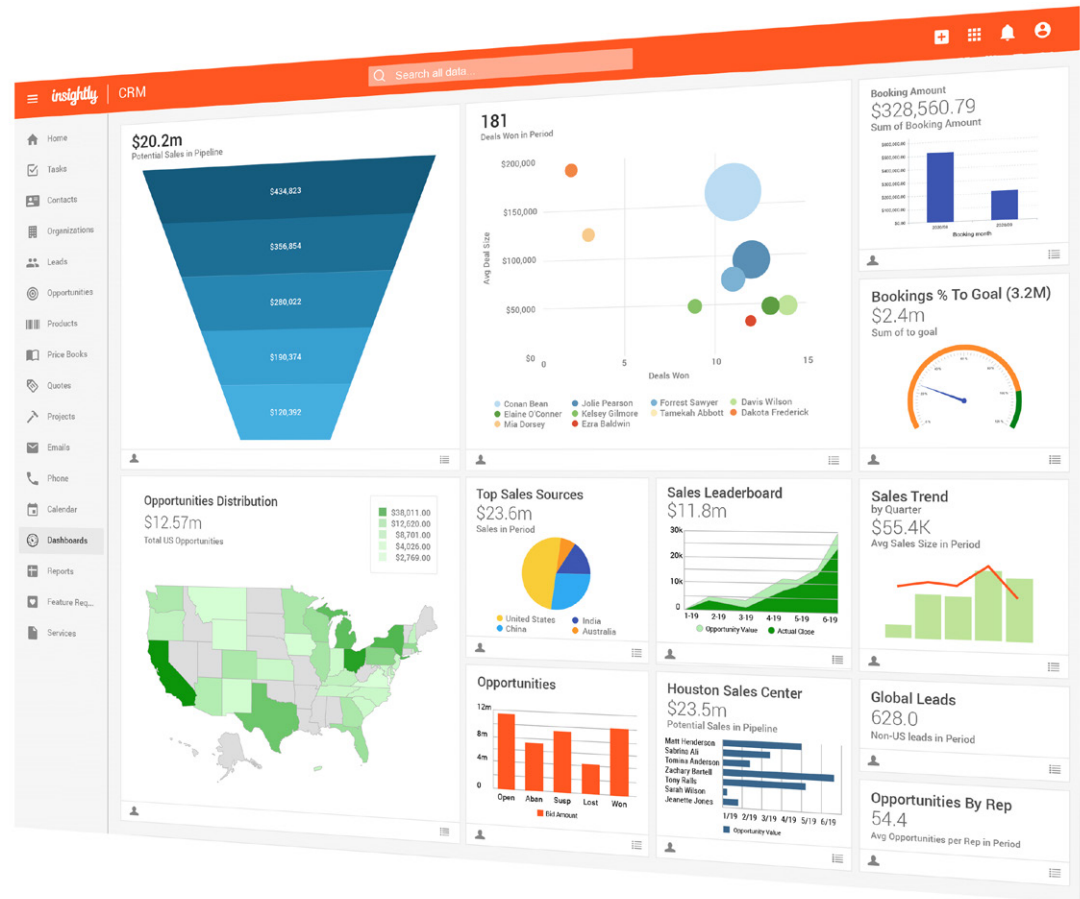
- ✓ You must have either the Professional, Enterprise, or Unlimited Salesforce plan to export your data from Salesforce.
- ✓ You must purchase an Insightly Professional or Enterprise account with a Premium, or above, Success Plan.
- ✓ You must be an administrator in Salesforce to export a full backup of your data.
- ✓ You have not exported your data from Salesforce for the current month (this depends on your Salesforce plan).

Step 5: Review

Although there's no one-size-fits-all formula for quantifying return on investment, here are a few tips to help you start measuring Insightly CRM performance after you've implemented the system.

Circle back to your CRM goals (which you set during the needs assessment stage of the switchover) to track progress. Get specific.

You can use Insightly's out-of-the-box dashboards or build custom dashboards with drag and drop. Easily organize, view, and share dashboards with key performance indicators (KPIs) across sales, marketing, and delivery.



An example of a sales dashboard in Insightly CRM.

Make your KPIs accessible

Defining a bunch of KPIs offers minimal value without transparent reporting. Use Insightly CRM to build custom reports and dashboards and slice and dice the data for analysis that's most relevant to your business. You can then convert all the data into charts or export to CSV format for further analysis.

Automate the review process

KPIs are often ignored unless they're woven into a formal review process. If you already have an operational review process, build custom CRM reports and use insights in strategy discussions and business decision-making.

Continuously tweak & refine

No process is perfect on day one. But by setting clear goals and tracking KPIs, your team will be in a much better position to make adjustments. Be sure to occasionally ask for candid end-user feedback. What do they like about your CRM? Are users creating unnecessary workarounds? Collecting this type of qualitative data will supplement the quantitative data found in your CRM reports. And, the Insightly team will be there along the way to help you make the most out of your CRM and reach your business goals.



Customer stories



Learn why companies leave
Salesforce for Insightly

Digital marketing agency saves 40% by switching from Salesforce to Insightly



Founded in 2005, PCG Digital is a New Jersey-based marketing agency that offers search engine marketing (SEM), social media advertising, search engine optimization (SEO), and content creation services. The agency specializes in helping car dealerships across North America to leverage digital strategies to grow their brands and build better customer relationships.

“Our sales team tracked their deals in Salesforce, which could not communicate with our project management and marketing systems,” says Jamie Paton, Director of SEO at PCG Digital. “Customer onboarding and engagement was difficult and time-consuming because we lacked a single source of truth.”

The team also needed flexible reporting capabilities that would allow them to provide rapid answers to time-sensitive requests from clients about budgets and service delivery. Vehicle manufacturers offer co-op marketing programs to help dealers advertise, but these programs can be complicated and require accurate reporting and documents for reimbursement.

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“Insightly provided us with specific instructions on what to do to prep the data before we cut over. We were able to seamlessly jump on board with Insightly; the process of getting everyone up and running took about four weeks from start to finish... Transitioning from Salesforce to Insightly allowed us to reduce our costs by 40%.”

Jamie Paton
Director of SEO



Seeking to overcome data silos, improve program reporting capabilities, and reduce costs, PCG Digital began evaluating its tech stack in 2005 and turned to Insightly as the right solution for their unique needs.

“Without Insightly, gathering key information used to take a full day, at least. Now it takes 15 minutes,” says Paton.

Within four to six weeks, the PCG Digital team were all set and ready to use Insightly. Insightly’s personalized training and support reps worked with PCG Digital to transfer all their Salesforce data, ensure a seamless transition for the team, and elevate their productivity.

Since implementing Insightly, PCG Digital has experienced increased levels of collaboration and productivity for a total cost of ownership that’s 40% lower than that of Salesforce.



National construction consortium achieves cost savings of 20% per user and improves customer relationships with a switch from Salesforce to Insightly



“Once I saw how valuable the insights were, the wheels started turning on other opportunities to maximize Insightly. Insightly will keep the leadership team better informed and push velocity through the sales process.”



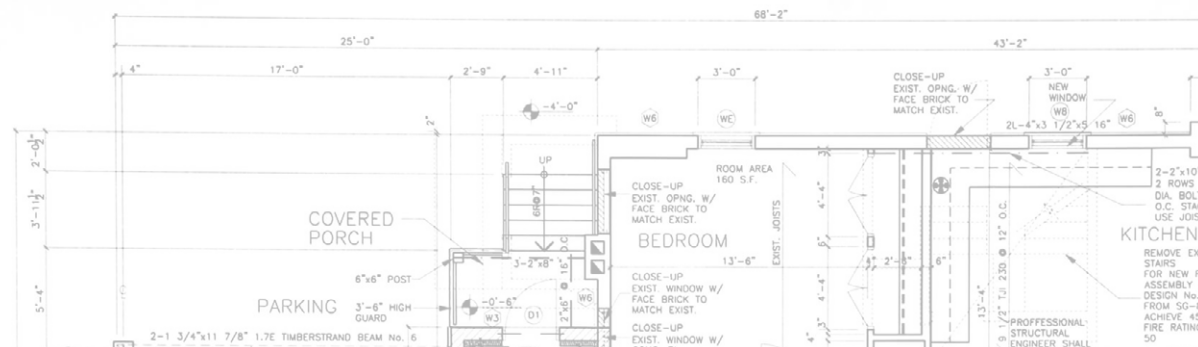
Brian Pavlick
Chief Operating Officer

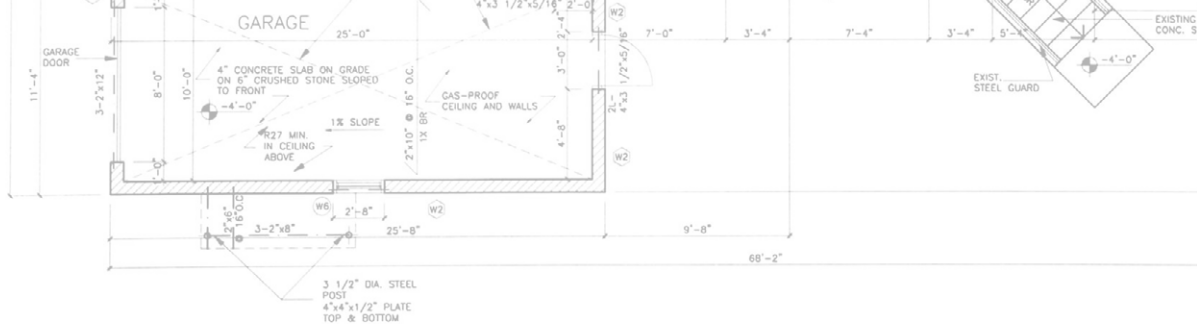
Founded in 2004 by a group of custom and independent builders in Northern Virginia, CBUSA is a homebuilding network that enables hundreds of premier builders across the country to reduce costs and extend their reach and scale with the network’s combined purchasing volume and power.

After 15 years of using Salesforce in parallel with an internal line-of-business system that maintained client records, including bids and pricing, CBUSA employees found problems with data integrity. They couldn’t integrate the two systems and they were duplicating work. Adoption was extremely low. Considering their need for a consistent methodology in data and processes, CBUSA decided to break from Salesforce.

In early 2019, CBUSA switched to Insightly to gain actionable data insights, align processes, and reduce costs. Insightly’s features, reasonable pricing, and customizable reporting were the perfect fit for CBUSA.

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One of the areas where CBUSA saw an immediate value was insights on customer retention and churn. Now they can review customer retention campaigns, create ideal customer profiles, and get a deeper understanding of their best customers.

Once the COO, Brian Pavlick, and other leaders saw the benefits of Insightly’s customer data management, they began to use Insightly for onboarding and sales initiatives. With Insightly, CBUSA was able to save 20% per user, align around a single source of customer truth, and improve customer retention.

“Insightly is the number one platform and priority for our executives to scale our processes nationwide and get the insights we need to make improvements in our business,” says Brian Pavlick, Chief Operating Officer, CBUSA.



Reasons to switch now

Switching CRMs is an important investment that carries consequences for your entire business. It requires stakeholder buy-in, planning, and research. Reluctance to change and the painful reality of having invested a lot of time and money in the current system can make staying with it feel like a safer choice.

To make an informed decision, assess your CRM needs in light of your business goals and crunch some numbers. You may find that staying with the status quo is riskier and costlier than switching to a CRM that better meets your business and budget needs. The sooner you switch, the sooner you'll start saving.

Here are a few factors to consider as you make your decision.

Data migration costs

Data migration is included in your Insightly CRM plan, it is not going to cost you extra. You don't need to hire a consultant or spend staff time on figuring it out. Insightly takes care of data migration for you.

User training & support costs

Insightly is a user-friendly CRM that doesn't require extensive ongoing user support. The enterprise plan provides you with ongoing user support at no additional cost.

Customization costs

All your customizations are factored into your CRM plan from the get-go, no hidden costs.



Current & long-term costs of maintaining the status quo

Calculate your Salesforce subscription and support fees. Has this expense remained relatively constant over time? If it has increased, then determine by what percent annually. If you have to hire consultants to manage the system or implement changes, how much does that support cost you annually? What are the intangible opportunity costs of staying with Salesforce?

CRM cost

Use Insightly's TCO calculator to compare your current Salesforce costs to projected Insightly CRM costs across the following, and see for yourself how much you can save with Insightly:

- ▶ Number of licenses
- ▶ Time horizon (in years)
- ▶ Training per user
- ▶ Implementation costs
- ▶ Priority phone support
- ▶ Priority email support
- ▶ Number of proactive account reviews per year
- ▶ Priority access to new features
- ▶ Admin cost per user
- ▶ Cost of full-time CRM admin

The screenshot displays the 'CRM Cost Calculator' interface. At the top, it compares the 'TOTAL COST OF OWNERSHIP BY PLATFORM' for Insightly (\$8,880) and Salesforce (\$23,300). A large orange callout bubble on the right states 'You save with Insightly: \$14,420'. Below the comparison, there are several input fields and sliders: 'Do you use Salesforce?' (Yes/No), 'How many CRM users?' (slider from 10 to 500), 'For how many months?' (slider from 12 to 120), and 'Add marketing automation?' (Yes/No). On the right side, there is a 'READY TO START SAVING?' section with input fields for 'First Name', 'Last Name', 'Email', 'Phone', and 'Number of Employees', followed by a 'START SAVING' button. A small note at the bottom of the calculator states: 'The CRM Cost Calculator makes certain assumptions. Read about them here.' and 'All fields required. Your contact details will be handled in accordance with our Privacy Policy.'

Make an informed decision

If you ask the right questions, gather all of the relevant data points, and synthesize the data in a way that makes sense for your unique business circumstances, you'll be able to make an objective, sound decision that addresses your current CRM needs and aligns with your long-term vision.

Next steps

At Insightly we believe that human connections are the foundation of lasting customer relationships. We've built our technology and our customer service on that belief.

Reach out to our team and let's start your switch from Salesforce to Insightly CRM.

Contact us:

sales@insightly.com

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About Insightly

Built from the ground up with the latest technology, Insightly is a modern unified CRM that provides businesses of all sizes and industries with secure, flexible, and scalable sales, marketing, and delivery solutions all in one place, without the high cost and complexity of legacy CRMs.

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[Insightly customers](#)



1.5 million+ users



25,000+ businesses



180 countries



All industries