

Salesforce for Recruitment: The Migration Guide

A step-by-step technical and operational guide for migrating from legacy ATS platforms to Salesforce.

Phase 1: Data Cleansing

Never migrate bad data. Before moving to Salesforce, audit your existing database. Archive candidates who haven't engaged in 3 years and standardize your job titles.

Phase 2: Field Mapping

Map your legacy ATS fields to standard Salesforce objects (Contacts, Accounts, Opportunities) and custom objects (Jobs, Applications, Placements).

Phase 3: User Adoption

Technology is only as good as its adoption. Run phased rollouts and provide role-specific training for consultants, resourcers, and management.

