



Data Migration

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OUR APPROACH

All data migrations are unique because even if the systems are the same, the data types and the use of the system will be different. Given how critical data is, we spend a significant amount conducting a full assessment of all data sources to clarify what data will be brought over and what won't, so that we can ensure the quality of the data.

A process focused on quality

Our process takes into account following steps:

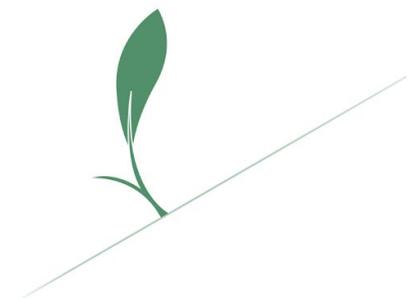
- Identify the various data sources (excel, legacy databases, etc.) that need to be imported into Salesforce. Given the unique nature of each client's dataset, we use a variable cost method for this phase.
- Cleaning and transforming data to map to Salesforce, including merging duplicates.
- Create data mapping and "migration rules".
- Review of mapping rules with Client for approval.
- Carry out the final extract of all data sources.
- Execute of Migration Rules, including Data Transformation.
- Conduct data validation with client.
- Final deduping and any clean-up post migration.

Note: Once we receive the Final extract of all data sources for migration the legacy systems will be Read Only. There will be a period of time between the Final Extract and the Training when Users will not be able to enter data into their old systems or the new systems. We always strive to limit this 'down time' as much as possible by importing the data over the weekend.

Salesforce Q&A

Why is data migration often one of the largest expenses in an implementation?

Costs can vary significantly because of data itself can vary quite a bit. Somethings that will impact data migration costs are: the number of sources, amount of data overlap, the number of records and tables, the amount of "cleanup" required, number of legacy systems to pull data from, the amount of deduping done by the client, and whether there will be access to data migration tools such as DemandTools or Apsona.





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