
TRUJAY DATA MIGRATION: WHAT TO EXPECT

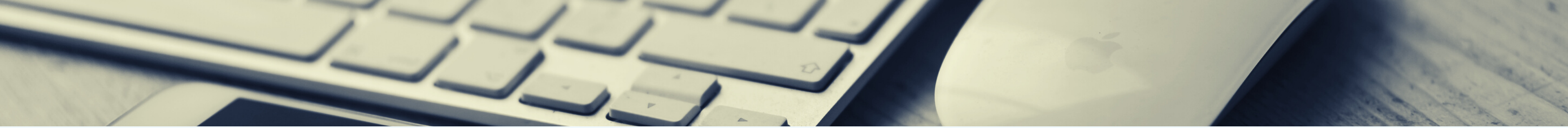


INTRODUCTION



Whether you've done a data migration, or this is your first time, we want to lay out the milestones and processes you can expect moving forward.

We want to take this time to point out that you really have three options when doing a data migration. 80% of the time, one of these options is the most popular. **Let's see if you can guess which one it is.**



- 1** You perform the data migration manually. You export the data; you stage the data for the target's exact formatting acceptance and import the data yourself. **No cost- many limitations- time consuming.**
- 2** You use an online tool like Trujay's Self-Service to hook up to your two solutions; do the migration online using our mapping interface and migration software. **Lowest cost- some limitations- a bit time consuming, but not terrible.**
- 3** You have experts take on the data migration and run the project from beginning to end; your involvement will only be for mapping the fields correctly and verifying test data. **Higher cost- little to no limitations- very low involvement/time consumed.**

OPTION 3: PUT YOUR DATA IN THE HANDS OF EXPERTS

Maybe you guessed it, but **option 3 is the most popular option companies move forward with.** It's not just because you don't have the kind of time to do the work, but it's mainly chosen because of data integrity. A company typically wants the migration executed by data experts and knows the ins and outs of the CRM solutions.



MISCONCEPTIONS

In some cases, there is the misconception that data migrations are a quick push of data from one system to the next.

WHY IS IT IMPORTANT TO US?



PLEASE ADVISE...



It's important to know that this is not how it should work. **We would never recommend pursuing a data transfer this quickly.** The risk of a data mess increases significantly. Data can be incredibly intricate, customizable and complex.

There are some cases where the migration can be executed faster due to small datasets, simple use of objects, low custom fields, and the company needs mirror their previous CRM in the target CRM. Meaning, not a huge re-structuring to the processes, along with the adaptation of new features and architecture of the new solution.

In these cases, we almost always point to our **Self-Service tool** where you can execute the migration yourself for the lowest possible cost.



HOW WE GET YOU A FIRM SCOPE

Elements of a Firm Scope



NDA

By signing a non-disclosure agreement, your data is protected. Data is not shared with anyone and we will delete your data from our servers once our transaction has been completely signed off.



SECURE ACCESS

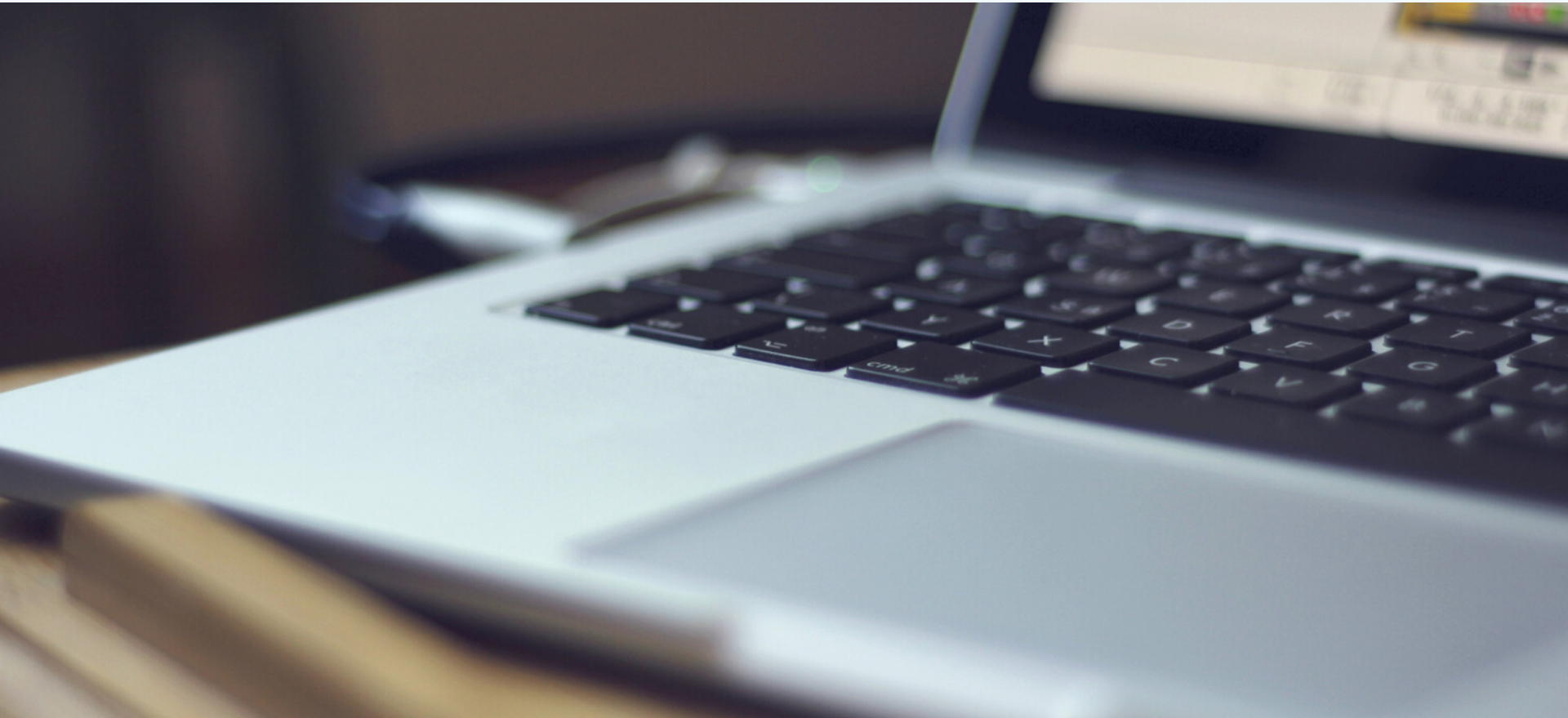
We send an encrypted link and access your dataset through APIs. Or, depending on where your solution is, we request a full data backup to upload on to our server, or request your target credentials.



EFFORTS DETERMINED

Once we have access, our tech engineers are going to begin building a report to determine efforts by analyzing volume and complexity.

BUILDING A REPORT



BUILDING AN ESTIMATE

BUILDING A REPORT/ESTIMATE

QUALITATIVE TIMELINE



OVERVIEW

The idea here is for you to see your dataset as a whole in a simplified way. What objects you're using, how many records per object, and how many custom fields.

HOURS BILLED

The estimate of hours to execute the migration in full will also be delivered in the report, along with the expected timeline duration and pricing.

REVIEW

Review what you need to bring over and what you don't need to bring over. Here is a great place to say, "I don't need 'Tasks' or 'Attachments' to come over." From there, we can simplify the scope.

CUSTOMIZE

This is if you have additional requirements such as filtering, merging, or cleansing any data. Let us know we can modify the scope in terms of timeline and hours to complete.

CUSTOM NEEDS

- Email contact cleansing
- Deduplicating with automation
- Building out workflows
- Building custom reports
- Onboarding or consulting services

We will itemize these options for you in a proper proposal. We'll configure your CRM solution and its pipelines, custom fields, and stages. Many choose to also do the onboarding/training or data optimization, depending on the target CRM.

TRUJAY

services

CUSTOM DATA MIGRATION

Data
Cleansing

Contact Email
Cleansing

De-
Duplicating

Onboarding
(HubSpot & Salesforce)

Training &
Implementation

Rebuild/Create
Workflows

Rebuild/Create
Custom Reports

Data Backups
& Parking

Weekly/Monthly
Backup

Custom Data Parking
(outside the SaaS)

Integrations

Custom Integration
(HubSpot only)

Native Data
Optimization

Zapier Trigger
Integrations

PROPOSAL CONFIRMED



After you are satisfied and have confirmed the proposal and scope of work, we provide you with our **MSA (Master Service Agreement)**.

The project begins with a kickoff call and introduction and orientation with your **dedicated account manager**. This person is an expert in data migrations and **will be assisting you throughout the entire process**.

FACTS AND FIGURES

75%

of the data migration is preparatory work. We firmly believe everything should be in the right place before any data starts moving.



the process to a trujay data migration





MILESTONES

MILESTONES

1

KICK OFF CALL

You and your account manager will jump on a 30 minute video call and use screensharing to go over the project as a whole. Some items that will be covered for alignment include:

- Access to all data is delivered
- Merging data requirements
- Filtering data requirements
- Project plan and timeline
- Data cleansing options
- Customized object placement

2

MAPPING SESSION

By this point, our tech engineers have been cache-ing your data and building your mapping interface that will serve as a tool and visual aid to add, delete or even merge fields.

You have the option to do this on your own or your account manager will help you. We're happy to provide as much guidance on mapping as needed.

MILESTONES

3

VERIFYING DATA

Here's where we grab a subset of data from your database and push it into the target with the mapping logic and any other custom requests to verify what it looks like on the other side.

Typically, we do two sample tests of data. Sometimes only one is needed, sometimes four. Every dataset is unique, so it can vary.

We're happy to run as many tests as needed. **We want to make sure we have it right before pressing the green light on moving data in bulk.** If something is off by a hair, no need to be concerned. We can go back in and fix it, it may just take some extra time.

4

PUSHING DATA

Once you've given us the green light, we begin the full migration. This process can happen in a day to five days, on average.

From time to time, we do get a million record-datasets, and these can push into the five day mark.

If preferred or requested, **we can run a full migration over the weekend**, so teams have the dataset in the new solution by Monday morning, **OR**, no one is in the solution changing fields and potentially interrupting the migration.

MILESTONES



QUALITY CHECK

Our technology should be able to tell us if all the data landed accurately, but we back this up by humans as well. We have a QA team that is dedicated to this very task: **to check the quality and placement of all data.**

This team stays on for two weeks after the migration has been completed and **checks for errors against the mapping as well as the associations between all objects.**



DELTA MIGRATION

What is a delta migration? How do we jump from one CRM to another while the train is still moving?

Your company can continue to work in the 'source' (current) CRM solution during the migration. We will still be moving the initial dataset over.

Once you and your team are ready to stop using the source solution and make that hard switch to the target solution, **we execute the delta migration.**

We simply reach back and grab any new data that came in during that timeframe and push it into the target. **This way, your teams can continue working the opportunities they were working on last week.**

WRAP UP

We hope this explanation of the process has helped give you a clearer understanding of how we execute a data migration. We have found this process to be the most efficient and proper way to achieve success. We have performed hundreds of migrations and this process has built and designed itself through experience, skills, and our technology. We look forward to helping you with this conversion!

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"The results were nearly perfect. For a migration with this much data, this many associations and this complexity, I am pleasantly surprised it was nearly flawless! From the initial conversation to the project management team at Trujay, everything went smoothly. It was obvious there were defined processes in place, and they were adhered to strictly, which was very impressive."

- AARON DYESS
PRESIDENT OF CAPTEVRIX

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