



Guided Self-Service Migration

Using the Self-Service Tool Under the Guidance of a CRM Data Expert.

You're not on your own.



Have no fear, the Guided Service is here.



In a recent discovery, customers are **too nervous** to use the Self-Service tool but believe it's right for their use case. We're here to clear the air and tell you that **just because it says “self-service” does not mean you have to do it alone.**



The process of doing a CRM data migration isn't typically something that is **automated**, especially if you have lots of [complex] data. And yet, Trujay is one of the few companies that has **created a software that does exactly that.**



A cheesy yet highly effective metaphor

The Carwash

PREAMBLE


The definition of “self-service” is in its name. It provides the setting and environment for a person to do something automatically and on their own. Think of a drive-thru car wash.

THE DRIVER, THE CAR, THE WASH


You, the decision-maker, are the driver, the car is your customer data, and the carwash is the software you’re about to run your car (your data) through.

GET ME A HUMAN!

Once you drive the car through the carwash, you may need human resources to come in and dry off your windshield. That’s the beautiful irony of our Self-Service tool- you don’t have to actually do it by yourself!



The Guided Service is available at **every stage** of the Self-Service Migration process. **This solution is for people who:**

- Don't need a sweeping change of process with the new features of the CRM
 - Need to save time, money, and headaches
 - Has a source CRM expiration coming quickly
 - Expected a higher budget for the migration but is lower than they wanted
 - Bandwidth of current workload won't allow for utmost undivided attention
- 

So, if you **want the Self-Service**
Migration but **don't want the**
super fun job of doing it
yourself, our Guided Self-Service
Migration is your ticket to the
cleanest car you've ever seen
(**new car smell included**).





The Guided Service can be triggered at **any time** during the Self-Service Migration process. If you kick off the migration on your own but get stuck on mapping, **we can jump in and guide you** from that exact point. If you'd like us to do the whole thing for you, we'll take the lead **from start to finish**.



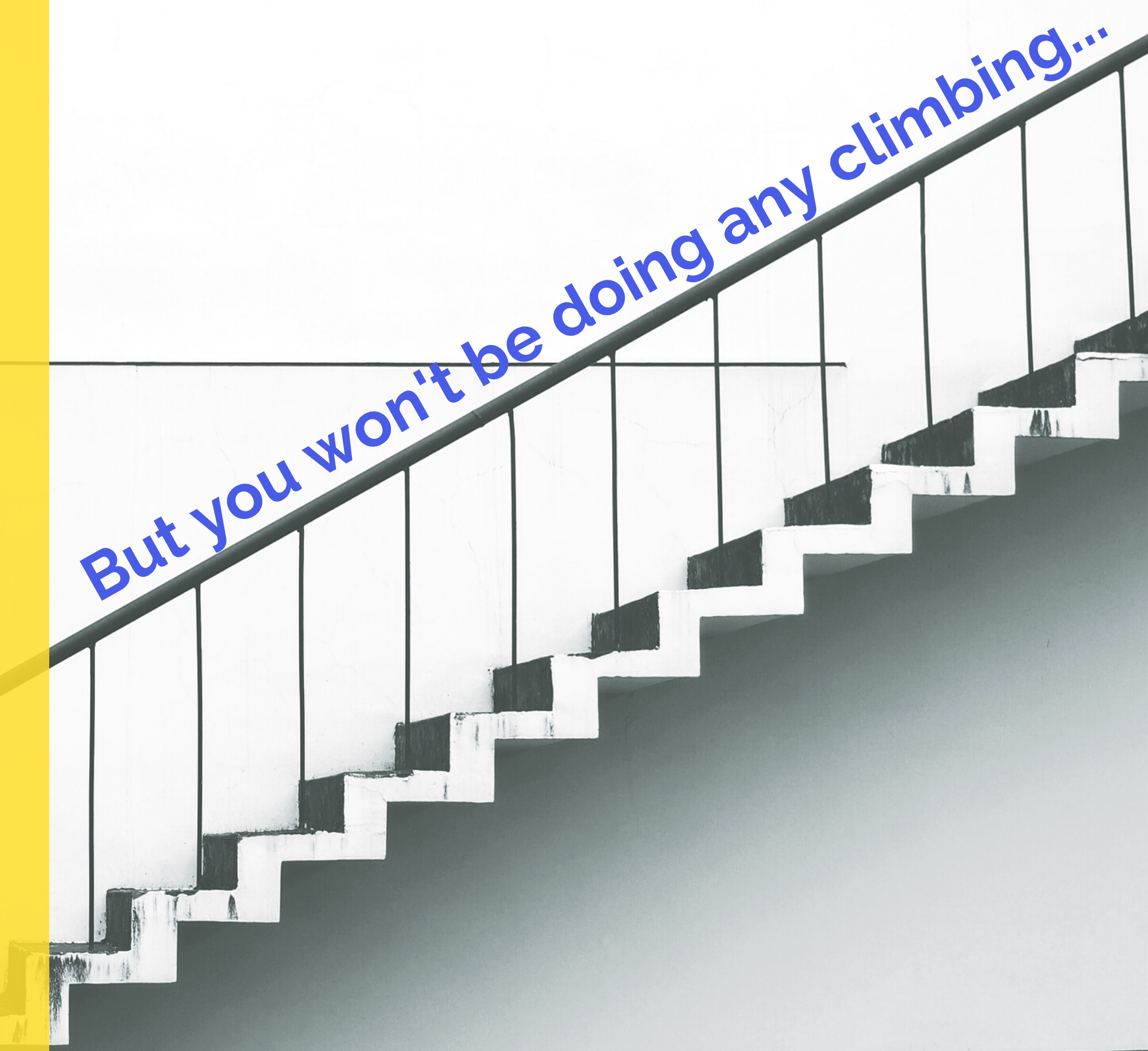
Typically, a user will start the free sample but get confused on the mapping part. Or, they are unclear on how to review their sample results. We've created **a service that omits all common issues while still satisfying your project needs**.

How it Works



Step-by-Step

What goes on behind the scenes
of your Guided Self-Service
Migration. Here's what happens
step-by-step...



1

Meet With a Trujay CRM Data Expert

Aka, your **personal, dedicated account manager**.
Provide your login credentials
for source and target CRMs
and connect the systems.

2

Have a mapping session with your account manager (optional) who **finalizes object/field mapping** and **confirms accuracy**.

Optional Mapping Session

3

Sample Migration

Your account manager will then **run the Sample Migration** and **review the sample results for you.**

This is essentially a demo version of the solution; a **free trial**, if you will. But your account manager is the one **doing it for you.**

Your account manager then **runs the Full Migration** and reviews the results to **confirm accuracy** and perfect **placement of objects** and their **related fields**.

Full Serviced Migration

5

Precision, Revision, Validation, Confirmation

Your account manager provides the **highest level of technical support.**

As a professional with years of experience, your field/object **mapping will be precise and mistake-less.**

Which brings us to pricing...



The Guided Service is an additional charge on top of the original Full Self-Service Migration. Typically, the Guided Service requires **3 to 5 hours of technical support with a rate of \$150.00 an hour.**

However, everyone works differently.

If less time is used, we would only charge you for the number of hours worked.

An aerial photograph of a two-lane asphalt road that curves through a dense, lush green forest. The road has white dashed lane markings and solid white edge lines. Several cars are visible on the road: a white car in the upper left, a blue car in the upper left, a white car in the middle right, a blue car in the lower right, and a white car in the lower right. The text "Final Words on The Guided Self-Service Migration" is overlaid in white on the left side of the image.

Final Words on The Guided Self-Service Migration



The word on the street is,
we've got your back.



We want you to use our services in ways YOU see fit and not be bound by barriers. **If you want to use the Self-Service tool but you don't want to do it yourself, our Guided Service will get you where you want to go.**

Most importantly, the Guided Service helps you know that you're doing this **right**. A Trujay CRM data expert will be assigned to help you with every aspect of the migration process. You can ask questions, **we'll help make things easy for you**. You can watch us work our magic via screen share after you've given us all the information over your needs.

If necessary, your account manager may bring up the possibility of doing a **Custom Migration**. As we dig into your data needs, your project requirements might be more complex than you think. **But that's the magic of our Guided Service!**

Not only do you get a free trial to see your data in action, but you also get an account manager to guide you through every step, saving you time on **figuring out what exactly your business needs.**



We live and breathe data. If we see something that will benefit you or vice versa, we maintain complete transparency. Your customer data is precious. Put it in the hands of the experts while still calling all the shots.



Below are some **helpful links** to get you started. Get in touch and start your Guided Migration right away!

An open notebook with lined pages is shown against a black background. Fresh green leaves are placed on top of the notebook, framing the text. The text is centered on the left page.

**To get the Guided
Self-Service Migration,
[click here.](#)**

**A Trujay expert will
be in touch shortly.**

Estimate the Cost of Your Full Migration

<https://trujay.com/price-estimator/>

How the Self-Service Tool Works

<trujay.com/how-self-service-migration-works/>

Start Free Sample Migration

<app.data2crm.com/migration/wizard/>

Guided Self-Service Migration Page

<trujay.com/guided-self-service-migration/>

All CRMs We Support

<trujay.com/supported-crms/>

Self-Service vs. Custom

<trujay.com/difference-between-self-service-and-custom-data-migrations/>

Contact Us

<trujay.com/contact-us/>

Email Us Directly!

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