

Foundation - Data Migration Services



Description

Service to migrate legacy data into a more efficient experience management system and deprecate legacy systems and processes.



Pain Points

- **Security Risks** – Potential security risk from exposure of sensitive information
- **System Management Challenges** – Challenges in managing multiple systems, processes, and workflows
- **Data Inconsistency** – Issues with data inconsistencies and compatibility due to varied data formats, structures, and standards
- **Data Integrity Maintenance** – Difficulty in maintaining data integrity, accuracy, and consistency
- **Database Adaptation** – Learning and adapting to new import database
- **Data Mapping** – The process of data mapping and documenting business decisions often proves complex and challenging, hindering strategic planning and decision-making
- **Limited Resources** – Limited resource availability, skill sets, and training needs
- **Repetitive Queries** – Repetitive questions on knowledge & practices for pitches
- **Operational Disruption** – Time consuming process that can disrupt normal business operations



Outcomes/Benefits

- Consolidation into a unified system for streamlined management of firm intelligence
- Data cleanse eliminating redundancies and errors
- Seamless integration of legacy systems into a single system with relationship tracking
- Application of best practice methodology in both Staging and Production environments
- Careful planning and execution minimizing disruption to business operations
- Upgrade to a system with an intuitive interface, enhanced functionality, and improved processes
- Improved data accessibility with easy data location and utilization
- Enhanced security measures provided by the new system
- Effective data extraction for outbound integrations to firm systems
- Cost savings from deprecating legacy systems
- Detailed documentation for reference and transparency



Firm Resources Required

- Lead time for SOW signing, resource allocation, and execution
- Firm IT Lead
- Firm BD/system owners' participation for requirements & business decisions
- Access and permissions to firm's source systems and software