



G-Cloud 15 Service Definition Document

Microsoft CRM Data Migration Services

v1.0

Lot 3: Cloud Support

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1 Microsoft CRM Data Migration Services

1.1 Service Summary

Microsoft CRM (Dynamics 365) Data Migration Services help public sector organisations move data safely and accurately from legacy systems into Microsoft Dynamics 365.

We deliver structured, auditable migrations that ensure data is clean, reconciled, and ready for business use from day one.

The service combines proven migration methods, specialist tooling, and strong governance to reduce risk, meet regulatory obligations, and support confident go-live decisions. It supports one-off migrations, phased transitions, and complex CRM modernisation programmes.

1.2 Buyer Personas (Who This Service Is For)

Role in Organisation	Objectives & Use Cases
Business Sponsor / Service Owner	Successful CRM go-live with minimal disruption Replacing legacy CRM with Dynamics 365 while protecting service continuity
Programme / Project Manager	Predictable delivery, controlled risk, clear governance Managing data migration as part of a wider CRM or digital transformation programme
Head of Data / Information Management	Improve data quality, ownership, and compliance Cleansing and standardising customer and case data during migration
IT / CRM Technical Lead	Secure, performant, and supportable migration approach Managing integrations, APIs, and Dynamics 365 entity constraints
Information Governance / DPO	Ensure GDPR and public sector compliance Controlling sensitive data handling, access, and audit trails

1.3 Key Service Features

- End-to-end data migration delivery: Delivery of complete data migration into Microsoft Dynamics 365 from assessment through go-live.
- Data profiling and migration readiness assessment: Assessment of source data quality, structure, and suitability for migration.
- Data cleansing, transformation, and enrichment: Cleansing and transforming data to meet Dynamics 365 data model and business rules.
- Data mapping and information structure design: Design of entity mappings, relationships, and lookup dependencies for Dynamics 365.
- Iterative migration and test loads: Execution of multiple migration cycles to reduce risk and improve data accuracy.
- Data validation and reconciliation: Validation of migrated data using record counts, control totals, and exception reporting.
- Cutover planning and go-live support: Planning and execution of controlled cutover activities to minimise service disruption.

- Documentation and knowledge transfer: Production of migration documentation and handover to support operational use.

1.4 Service Benefits

- Lower risk at go-live
- Trusted, reconciled data in Dynamics 365
- Faster and more predictable delivery
- Improved user confidence and adoption
- Reduced defects and post-go-live rework
- Clear audit trails and traceability
- Reduced downtime during cutover
- Stronger long-term data governance
- Compliance with public sector data standards
- Clear accountability for data decisions

1.5 What's In & Out

What's In	What's Out
Source system data assessment and profiling	Dynamics 365 licence costs
Data mapping to Dynamics 365 entities	CRM functional configuration beyond migration needs
Data cleansing and transformation rules	Ongoing data stewardship after handover
Migration tooling configuration and execution	Non-CRM system migrations unless agreed separately
Test migrations and validation cycles	Major redesign of business processes
Cutover planning and go-live support	
Reconciliation and sign-off support	
Migration documentation and handover	

1.6 Engagement Model

Buyers typically engage with this service in clearly defined phases, which can be purchased individually or as a combined engagement:

Phases	Activities	Outputs
Discovery and Assessment	• Review source systems, data quality, and migration scope • Identify risks, dependencies, and constraints • Agree migration approach and governance	• Migration assessment and readiness report, • High-level migration plan and schedule, • Risk and assumptions log

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Phases	Activities	Outputs
Design and Preparation	- Define data mappings, transformations, and validation rules - Configure migration tools and security controls - Prepare test migration datasets	- Approved data mapping and transformation design - Migration runbooks and configuration artefacts - Test migration plan
Migration and Validation	- Execute iterative test migrations - Validate data and reconcile results - Manage defects and remediation	- Validated test migration results - Reconciliation and exception reports - Business sign-off for cutover
Cutover and Go-Live	- Execute final migration and cutover activities - Support go-live and stabilisation - Complete knowledge transfer	- Live Dynamics 365 data set - Cutover completion confirmation - Migration documentation and handover pack

Typical Engagement Timelines

- Small CRM (single source, low complexity): 4–6 weeks
- Medium CRM (multiple entities, moderate cleansing): 8–12 weeks
- Large / complex CRM (multiple sources, high volumes): 3–6 months

Timelines depend on data quality, volumes, and business availability.

1.7 Commercial Flexibility

- Short-term engagements for assessments or proofs of concept
- Fixed-scope delivery for defined modernisation work
- Call-off support for ongoing improvement or optimisation
- Suitable for both small initiatives and multi-phase programmes

1.8 Delivery Constraints and Pricing Assumptions

- Migration success depends on source data quality and access
- Business availability is required for validation and sign-off
- Dynamics 365 entity rules and API limits affect load performance
- Scope stability is required once design is agreed
- Pricing assumes timely decisions and agreed reconciliation rules
- Significant configuration changes during migration may incur change control

1.9 Security and Data Protection

- Aligned with UK GDPR and the Data Protection Act 2018
- No transfer of data ownership

- Role-based, advisory-only access to buyer environments
- Operates in line with ISO 27001 and ISO 9001 principles
- Aligned to the Oracle Cloud shared responsibility model

1.10 Accessibility and Inclusivity

The service is delivered in a manner that supports inclusive participation. This includes:

- Provision of documentation in accessible digital formats on request
- Use of clear, plain language suitable for mixed technical and non-technical audiences
- Flexible engagement approaches to support diverse stakeholder needs

1.11 Risks, Limitations and Mitigations

As an advisory service, successful outcomes depend on the accuracy and completeness of information provided by the buyer and on subsequent implementation by the buyer or third parties.

Identified risks include:

- Changes in scope or priorities during delivery
- Dependency on third-party delivery partners

Mitigations include:

- Clear assumptions and constraints documented at the outset
- Regular validation of findings with stakeholders
- Transparent documentation of recommendations and trade-offs

1.12 Service Management and Governance

Each engagement is managed using an agreed delivery plan and governance structure. This includes:

- Defined roles and responsibilities
- Quality assurance of deliverables
- Risk and issue management
- Continuous improvement informed by buyer feedback