



Service Definition – CRM Migration

Service Definition: CRM Migration – GOV.UK Digital Marketplace

1) Service Overview

Cantata provides vendor-independent CRM migration services to help public-sector organisations move from legacy CRM platforms or older cloud instances to modern cloud CRM solutions such as Microsoft Dynamics 365 or Salesforce. Our approach ensures secure, auditable, and low-risk migration of data, configurations, integrations, and user access with minimal disruption.

Ideal for: organisations retiring legacy systems, consolidating multiple CRM instances, or re-platforming to cloud following organisational change.

2) Migration Scope

- Discovery & assessment: source/target inventory, customisations, integrations, data models, volumes, quality, security roles
- Migration strategy: approach selection (big-bang vs phased), cutover plan, fallback options, freeze windows, communications
- Data migration: ETL processes, cleansing, deduplication, mapping to target schema, audit trail
- Configuration migration: forms, fields, views, workflows, automation, security roles
- Integration migration: interface catalogue, adapters, scheduling, error handling
- Environment setup: dev/test/prod, identity and access (MFA/SSO), monitoring
- Adoption & training: role-based learning, hypercare support
- Cutover & hypercare: rehearsals, dry-runs, final execution, early-life support

3) Outcomes & Deliverables

- Migration plan with detailed steps, roles, timings, and rollback options
- Data mapping specification and transformation rules with quality metrics
- Test plans and evidence: functional, performance, security, reconciliation
- Executed migration with audit logs and reconciliation reports
- Cutover checklist and hypercare report
- Knowledge transfer: admin guides, support collateral

4) Methodology & Phases

Phase 1 – Discover & Design

- Stakeholder and technical interviews; success criteria and constraints
- Source/target analysis; data profiling; customisation/integration catalogue
- Risk assessment and migration strategy; acceptance criteria

Phase 2 – Build & Test

- Build ETL pipelines and migration tooling; configure target environment
- Prototype migration with sample data; configuration/integration migration rehearsal
- Testing: functional, performance, security, reconciliation

Phase 3 – Cutover & Hypercare

- Freeze window and communications; final data delta loads
- Execution of cutover run-book; go/no-go checkpoint; rollback path maintained
- Hypercare support; defect triage; adoption clinics; transition to BAU

5) Data Quality & Governance

- Data profiling: completeness, consistency, duplicates, referential integrity
- Cleansing and deduplication routines with audit trail; master data alignment
- Privacy and retention rules applied; lawful basis and DPIA support
- Reconciliation metrics agreed with business owners; exception management

6) Onboarding & Offboarding

Onboarding: kick-off, access to environments, confirm scope, risks, timelines, governance and communications.

Offboarding: delivery of documentation and artefacts; knowledge transfer; exit briefing; optional shadow support.

7) Service Levels & Governance

Example SLA targets during cutover and hypercare:

Priority	Impact	Response Time	Resolution Target
P1 – Critical	Service unavailable / major impact	1 hour	4 hours
P2 – High	Major feature degraded	2 hours	1 business day
P3 – Medium	Single team affected	1 business day	3 business days
P4 – Low	Minor issue / request	2 business days	Scheduled window

8) Security, Privacy & Accessibility

- Operate under client security policies; least-privilege and MFA; secure transfer channels
- UK GDPR aligned: Data Processing Agreement, data minimisation, masking in lower environments
- Accessible documentation (tagged PDFs/structured Word); inclusive training materials

9) Dependencies & Constraints

- Access to source/target systems, schemas and API limits; identity and permissions set-up
- Availability of subject-matter experts for mapping, testing and acceptance
- Agreed freeze windows and deployment paths; third-party vendor coordination

10) Evidence & Case Studies

Available on request

11) Why Cantata

- Independent and vendor-neutral: migration approach chosen for business outcomes, not vendor preference
- Proven CRM-only specialists: deep experience across Dynamics 365, Salesforce, and adjacent stacks
- Risk-controlled delivery: rehearsals, checkpoints, rollback paths, auditable reconciliation

12) Contact

Cantata Limited

Oxford Technology Centre: Magdalen Centre, 1 Robert Robinson Avenue, Oxford OX4 4GA

+44 (0) 1865 784000 | www.cantatagroup.com