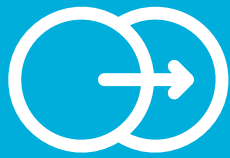




Data Migration & Integration Services



Service Definition

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Why 5Y?

We take a different approach to data transformation

We believe transformation starts with insight, not systems. We're disrupting the traditional landscape with a suite of platforms, services and solutions that get you from raw data to insights faster and more cost-effectively than ever before.



Faster Insights. Lower Costs. Better Outcomes. Guaranteed.

We empower organisations to become data-centric by accelerating access to data from any system or application. We transform this data into actionable insights that guarantee to drive improved business outcomes and enable sustainable growth.

We're confident we can deliver these outcomes because we've done it for others—turning data chaos into clarity and inefficiencies into savings.

80%

of your BI analytics ready out of the box from day one

50%

faster implementation, freeing up your team's time and budget

50%

reduction in data engineering costs

*The "80% analytics-ready" figure applies specifically to engineering tasks such as data ingestion, integration, and preparation. The 50% faster implementation and 50% reduction in engineering costs are based on our observed averages across typical client projects. Actual results may vary depending on project scope, data quality, and unique business requirements.

We believe in a data-centric future.

Everything we do is driven by the following four principles...

Build systems, deliver outcomes.

Our aim is always to go beyond technology, helping organisations use data to drive meaningful, lasting change.

Insight should be embedded, not episodic.

We designed our platforms to not only unify data but also empower people to act on it every day.

Independence over dependency.

Our goal is to enable customers to self-serve, not to lock them into long-term service contracts.

Enablement, not ownership.

We built a modular platform so customers could scale at their own pace. Where customers need additional support, we offer a managed service model to help them succeed.

The 5Y way

We believe organisations shouldn't have to choose between speed, quality and cost when becoming data-driven. The world is constantly evolving and businesses that build systems from scratch or rely on slow, expensive consultancies will get left behind.

Service Overview

Data Migration & Integration Services provide structured, secure and validated support for migrating data between systems and integrating platforms as part of cloud adoption, system modernisation, and digital transformation initiatives.

The service supports organisations to plan and execute data migrations from legacy, on-premise or incumbent systems to modern cloud-based platforms, as well as to design and implement integrations between new and existing systems. Delivery focuses on data accuracy, continuity of service, auditability, and controlled cutover to minimise operational risk.

This service is suitable for migrations associated with cloud platform adoption, application replacement, platform consolidation, analytics modernisation, and interoperability programmes.

Example migration and integration scenarios

This service supports migration and integration of data associated with common public sector systems and platforms, including:

- Enterprise systems such as finance, HR and procurement platforms
- Customer, citizen and case management systems
- Line-of-business and operational applications
- Document, records and file-based data repositories
- Reporting, analytics and data warehouse environments

Migrations may involve movement of data from on-premise or legacy environments to cloud-based platforms, consolidation of multiple data sources, or integration between new and existing systems in hybrid architectures.



Service Features

The service may include:

Assessment of data sources, structures and migration complexity, including legacy and cloud environments

Definition of migration and integration strategies, aligned to business criticality and risk

Source-to-target data mapping, including schema alignment and transformation rules

Execution of data migration processes, including bulk, incremental or phased migrations

Validation, reconciliation and completeness checks to assure migration quality

Design of integration patterns and interfaces, such as batch, near-real-time or event-based approaches

Common migration and integration scenarios

The service supports a wide range of public sector use cases, including but not limited to:

Legacy databases or file-based systems → cloud data platforms or managed databases

On-premise applications → cloud-hosted or SaaS platforms

Incumbent systems → replacement line-of-business applications

Multiple fragmented data sources → consolidated data platforms or analytics environments

Transactional systems → reporting, analytics or data warehouse platforms

Point-to-point integrations → standardised integration or API-based patterns

Integrations may span cloud-to-cloud, on-premise-to-cloud, or hybrid environments, depending on organisational context.

Migration & Integration Outputs & Deliverables

The service provides a comprehensive set of structured migration and integration deliverables to support assurance, auditability, data quality, and controlled cutover. These outputs give stakeholders full visibility of data preparation, transformation, integration design, testing results, and final outcomes.

1

Planning & Design Deliverables

Migration & Integration Strategy, covering approach, sequencing, risks, dependencies and phasing.

Integration architecture and interface design, defining payloads, schedules, event triggers and authentication methods.

Environment & readiness assessments, identifying blockers, required access, third party dependencies, and pre migration conditions.

2

Source-Target Alignment Deliverables

Source to target mapping specifications, including field level alignment, transformation rules, default logic and business rules.

Data dictionaries and metadata updates, describing structures, definitions and lineage.

Data profiling and quality assessments, highlighting anomalies, cleansing needs and remediation steps.

3

Data Preparation, Cleansing & Transformation Deliverables

Data cleansing reports, detailing corrections, enrichment steps, standardisation actions and outstanding issues.

Exception, variance and defect logs, including severity, root cause, remediation actions and impact analysis.

Reference and master data alignment outputs (where applicable).

4

Migration Execution Deliverables

Dry run and rehearsal migration reports, documenting volume counts, load durations, exceptions, success rates and deltas.

Incremental migration logs, capturing changed records, failed items, retry logs and transformation results.

Validation & reconciliation reports, including; pre and post migration record counts, field level comparisons, variance documentation and resolutions, and completeness & accuracy evidence.

5

Integration Execution & Testing Deliverables

Interface configuration documentation, including connectors, service endpoints, authentication flows and mapping logic.

Integration test reports, covering connectivity checks, error handling validation, end to end flow testing, and throughput benchmarks.

Data exchange and API monitoring logs, verifying payload structure, schema compliance, and expected data transfer frequency.

6

Cutover & Transition Deliverables

Cutover plan and runbook, including timings, sequencing, dependencies, checkpoints and stakeholder responsibilities.

Rollback plan, defining triggers, contingency actions and validation steps to revert to pre migration state.

Cutover readiness assessments, confirming issue clearance, environment readiness, data validation status and stakeholder approvals.

7

Final Assurance & Closure Deliverables

Final Migration & Integration Outcome Report, summarising results, assumptions, limitations, risks, and acceptance status.

Audit evidence pack, including mapping files, reconciliation extracts, interface test results, defect logs and sign off records.

Post migration review & lessons learned, recommending improvements for future phases or integrations.

Service Benefits

Engaging this service can help organisations to:

- ✓ Reduce risk during system replacement and platform transitions
- ✓ Improve the accuracy, completeness and reliability of migrated data
- ✓ Maintain continuity of business operations during migration activities
- ✓ Improve consistency of data across integrated systems
- ✓ Increase confidence in migration outcomes through validation and assurance
- ✓ Enable smoother adoption of new platforms and services

Service Scope

The Data Migration & Integration Services provide end-to-end planning, design and execution of data migration and integration activities to support cloud adoption, system modernisation and platform replacement initiatives. The scope of this service includes:

- Assessment of data sources**, structures and migration complexity, covering legacy, on-premise and cloud environments.
- Definition of migration and integration strategies**, aligned to business criticality, operational risk and organisational constraints.
- Source-to-target data mapping**, including schema alignment, transformation rules and business logic.
- Data preparation activities**, such as cleansing, standardisation and quality uplift.
- Execution of data migration processes**, including bulk, incremental or phased migrations.
- Validation**, reconciliation and completeness checks, ensuring data accuracy, auditability and confidence in migration outcomes.
- Design of integration patterns** and interfaces, such as batch, near-real-time or event-driven data flows.
- Cutover, transition and rollback support**, ensuring controlled switchover with minimal operational disruption.
- Documentation of migration outcomes**, including assumptions, limitations, reconciliation evidence and lessons learned.

The service focuses on delivering accurate, reliable and auditable data movement and integration outcomes that support successful transition to new or modernised platforms.

Service Constraints

Delivery of this service is dependent on the following:

- An agreed scope and statement of work, detailing the datasets, systems, sequencing and migration approach.

- Access to required source and target systems, including legacy environments, APIs, databases, documentation and relevant cloud platforms.

- Availability of customer stakeholders, including technical SMEs, data stewards, system owners and decision-makers for validation and approvals.

- Condition, quality and completeness of source data, which may limit feasibility or affect migration timelines.

- Dependencies on third-party platforms, suppliers, APIs or infrastructure, which may impact integration or migration performance.

- Compliance with data protection, security and regulatory requirements, particularly where sensitive or personal data is involved.

What Is Not Supported

The service does not include, unless explicitly contracted under a separate agreement:

- Ongoing operational support, BAU incident management or live environment monitoring

- Platform hosting, licensing or infrastructure provisioning

- Managed services or continuous integration support after cutover

Delivery concludes at the point of handover, following execution, validation and completion of the agreed migration and integration activities. Any post-cutover assistance or enhancements fall outside the service scope unless formally agreed.

Support Delivery Model

Support for the Data Migration & Integration Services is focused on enabling successful delivery of migration, validation and integration activities throughout the project lifecycle.

Support covers discovery, mapping, cleansing, testing, migration execution, integration configuration and cutover readiness. It does not include live operational support unless contracted separately.

Support Hours & Availability

Core Support Hours

Support is available during standard UK business hours:

- | Monday–Friday, 09:00–17:30 (UK time)
- | Excludes UK public holidays

During core hours, customers can access:

- | Email and ticketing support
- | Phone support
- | Scheduled calls for progress checks, data validation and technical clarification

Out of Hours Availability

Out-of-hours support may be provided where explicitly agreed, typically for:

- | High-risk cutover windows
- | Time-sensitive migration rehearsal cycles
- | Critical issues that may delay go-live

Urgent Issue Handling

Urgent migration or integration issues are prioritised using delivery-focused severity categories:

- | High – Delivery-Critical: Blocks migration progress, affects cutover readiness, or compromises target system load.
- | Medium – Delivery-Impacting: Impacts a non-critical dataset, test cycle or interface; workarounds available.
- | Low – Non-Blocking: Minor mapping queries, documentation clarifications, or enhancement suggestions.

These reflect migration-phase impact rather than live production incident levels.

How Support Requests Are Raised

Email

Used for:

- | Data mapping clarifications
- | Schema or transformation rule queries
- | Questions arising from profiling, cleansing or reconciliation activities

Online Ticketing System

Used for structured support including:

- | Issue logging and tracking
- | Attachments for mapping sheets, logs or validation evidence
- | Status updates and communication during migration cycles
- | Collaboration between engineers, integration specialists and customer SMEs
- | The platform is WCAG 2.2 AA accessible.

Phone Support / Scheduled Calls

Used for:

- | Daily stand-ups during migration execution
- | Dry-run / rehearsal migration reviews
- | Integration troubleshooting
- | Cutover readiness reviews and decision checkpoints

Named Migration Lead / Technical Delivery Lead

Acts as the primary point of contact and escalation route during delivery phases.

Issue & Escalation Management

Issue Identification & Logging

Issues may be identified by:

- | Data profiling or cleansing
- | Transformation and mapping validation
- | Migration dry-runs or incremental loads
- | Integration test cycles
- | Reconciliation and variance analysis

All issues are logged in the ticketing system or via email.

Severity Assessment

Severity levels consider:

- | Impact on migration sequencing
- | Risk to cutover
- | Volume or criticality of affected data
- | Dependencies on external systems or suppliers

Escalation Routes

- | Engineer → Senior Engineer
- | Senior Engineer → Migration Lead
- | Migration Lead → Practice Lead / Engagement Lead

Escalation is triggered when:

- | Issues threaten delivery timelines
- | Data integrity risks are identified
- | Integration dependencies require architectural decisions

Communication During Incidents

Customers receive:

- | Acknowledgement of issue logging
- | Regular updates based on severity
- | Notification of required decisions or additional information
- | Confirmation when issues are resolved and validated

Post Incident Reporting

For High-severity issues:

- | Summary of root cause (where identifiable)
- | Remediation actions completed
- | Confirmation of data integrity or integration stability
- | Any follow-up corrective actions

Remote and On Site Support

Remote Support (Default)

Covers:

- | Data mapping workshops
- | Cleansing and profiling reviews
- | Integration design sessions
- | Reconciliation and validation walkthroughs
- | Cutover/go-live coordination

On Site Support (Where Agreed)

May be provided for:

- | Complex discovery sessions
- | Multi-team cutover planning
- | High-risk migration execution windows
- | In-person workshops with business owners or technical SMEs

On-site engagement must be agreed in advance and may incur additional costs.

Resourcing Model

Named Migration Lead / Delivery Lead

Provides:

- | Single point of contact
- | Oversight of migration, integration and validation workstreams
- | Coordination across technical teams and external suppliers

Pooled Delivery Team

May include:

- | Data migration engineers
- | Integration specialists
- | Data quality analysts
- | Test/validation analysts
- | Technical authors
- | Cloud engineers

Engagement Types

Ad Hoc Support

For targeted assistance such as:

- | Data profiling
- | Mapping refinement
- | Integration configuration updates

Time Boxed Engagements

Used for:

- | Migration readiness assessments
- | Dry-run cycles
- | Reconciliation testing
- | Cutover rehearsal activities

Project-Based Delivery

Covers the full end-to-end lifecycle:

- | Assessment
- | Mapping
- | Cleansing
- | Migration execution
- | Integration build
- | Testing
- | Cutover
- | Handover

Onboarding & Service Initiation

Onboarding ensures the migration/integration engagement begins with full alignment on scope, technical approach, data handling, and cutover expectations. Service initiation begins once the Statement of Work is agreed and prerequisites are in place.

1. Kick Off & Engagement Mobilisation

Kick-off meeting to introduce the delivery team, confirm objectives, and agree communication and governance (stand-ups, checkpoints, approvals).

Planning & design setup, including the Migration & Integration Strategy (approach, sequencing, risks, dependencies, phasing) and integration architecture/interface design (payloads, schedules, event triggers, authentication).

Environment & readiness assessments to confirm access, identify blockers, and verify pre-migration conditions.

2. Information Required From the Customer

Access to source and target systems, APIs, data dictionaries, metadata, and any relevant cloud/on-prem environments.

Stakeholder and SME availability (system owners, data stewards, approvers) for validation and decision-making.

Business rules and mapping inputs to support source-to-target mapping (field alignment, transformation rules, defaults, business logic).

Operational context (blackout windows, service continuity requirements, compliance constraints) to shape approach and cutover plans.

3. Confirming Scope, Timelines & Responsibilities

Scope confirmation across datasets, systems, sequencing, and chosen migration style (bulk, incremental, phased).

Timeline planning for discovery, profiling/cleansing, rehearsal cycles, validation/reconciliation, and final cutover.

Roles & responsibilities (Migration Lead, engineers, QA/validation, SMEs, approvers) and escalation routes.

Offboarding & Exit Support

Offboarding provides a structured close-out with full artefact handover, assurance evidence, and knowledge transfer so you can operate confidently post-cutover.

1. Offboarding Activities

Formal handover of all artefacts, including source-to-target mappings, transformation rules, interface configurations, and deployment/runbook materials.

Knowledge transfer sessions covering migration approach, integration flows, validation/reconciliation methods, and operational considerations.

Assurance & outcomes pack, including validation & reconciliation reports (record counts, field-level comparisons, variance documentation, completeness/accuracy evidence), integration test reports, and data exchange/API monitoring logs.

Cutover closure with cutover plan & runbook and rollback plan archived, plus a Final Migration & Integration Outcome Report and audit evidence pack (mapping files, reconciliation extracts, interface test results, defect logs, sign-off records).

Post-migration review & lessons learned, with recommendations for future phases.

2. Information Required From the Customer

Final acceptance of deliverables and migration outcomes; confirmation of any residual actions.

Approval to revoke supplier access and to delete any temporary artefacts retained during delivery.

Identification of BAU owners for ongoing data governance/integration management.

3. Confirming Scope, Timelines & Responsibilities for Exit

Agreement of handover dates, document delivery locations, and access removal checkpoints.

Confirmation of future enhancement or follow-on needs and how they'll be managed.

Security & Data Protection

The service is delivered in alignment with robust security and data protection practices to ensure confidentiality, integrity, and appropriate handling of customer information throughout migration and integration delivery.

Access Controls

Access to customer environments, interfaces, and repositories is restricted to authorised team members and granted on a least-privilege basis for discovery, build, testing, and cutover tasks.

Access is time-bound for the duration of delivery and revoked at offboarding.

Role Based Permissions

Rights are assigned by role (e.g., migration engineer, integration specialist, QA/validation analyst).

Elevated privileges for deployment or interface administration are granted only when necessary and approved by the customer.

Secure Handling of Customer Data

Work is performed within customer-approved environments; validation and reconciliation evidence is produced to demonstrate accuracy and completeness of migrated data.

Test data follows customer policy; where appropriate, anonymised/masked data is preferred.

Temporary artefacts (logs, extracts, mapping drafts) are retained only as long as required and securely deleted at offboarding once the customer confirms no further retention is required.

Alignment with UK GDPR

We operate in accordance with UK GDPR principles (lawfulness, purpose limitation, minimisation, integrity/confidentiality).

During delivery, we typically act as a data processor when handling customer-supplied data/metadata and comply with any additional regulatory requirements specified in the engagement's constraints.

Secure Communication Channels

Architectural artefacts, mapping specifications, logs, and outcome reports are exchanged via encrypted email, secure ticketing/document-sharing, and managed conferencing tools; unapproved channels are not used.



Hosting & Data Location

Support for the service is provided via secure, cloud-based collaboration and ticketing systems. Migration and integration work itself is executed within the customer's environment; the service does not include hosting customer platforms or production data on supplier infrastructure.

Support System Hosting

Email/ticketing/collaboration and document-sharing tools run in secure, cloud-based environments with enterprise-grade access controls and encryption.

Delivery artefacts (design notes, mapping specs, test evidence) are stored only within authorised project workspaces.

Customer Data Residency

No customer production data is hosted by the supplier; data movement and interface execution occur inside customer-approved environments.

Any customer-provided materials (schemas, mapping sheets, sample extracts) are stored only in approved systems for the duration of delivery.

No Persistent Hosting of Customer Data

The service does not provide hosting, licensing, or platform management; post-cutover, environments remain under customer control.

Temporary files or test extracts created during delivery are retained only as needed and securely deleted during offboarding once the customer confirms deletion can proceed.

Data Residency for Support Logs & Artefacts

Support logs (ticket metadata, issue history) may include limited personal data (stakeholder names/contacts) but never customer datasets or transactional payloads.

Logs and artefacts are retained only for contractual/audit purposes and then deleted per retention policy; region/residency can be aligned to customer requirements.

Pricing Information

Pricing for this service is provided in the G-Cloud pricing document.

Client Success Story

From Fragmentation To a Unified Patient Experience



The Challenge:

Our client, a leading global healthcare group in the hearing care sector faced significant challenges after a major acquisition program in North America, inheriting fragmented and unstable legacy systems. These included customer relationship management (CRM) tools, patient management platforms, and heavily customised ERP systems, all containing overlapping and inconsistent B2C data. The challenge was immediate and complex: How do you consolidate private patient data across fragmented, unstable legacy systems into a single, trusted view—without disrupting ongoing operations or breaching regulatory compliance frameworks such as GDPR?

The Solution:

Deployment of the 5Y Unified Data Platform addressed these challenges by unifying data across legacy systems through a modular, Azure-native framework. With pre-built logic for mastering, survivorship, and recovery, the platform enabled seamless integration between modern front-end applications (CMS, AC App) and backend systems like NAV 17 and Dynamics CE. This solution maintained patient data, enhanced patient engagement across their care journey through stable omnichannel experiences and provided a scalable foundation for future growth—all while maintaining full compliance and operational continuity.

Business Impact

- Transformed disconnected patient records into a single trusted view
- Eliminated costly system outages

-70%
Duplicates

+85%
Matching

2×
Processing

12+
Countries

Client Success Story

From complex reporting requirements to actionable insights



The Challenge:

How do you give every team timely access to operational insights when manual reports are slowing you down? That was the challenge facing one of the UK's largest providers of affordable and social rent housing. While they had implemented Microsoft Dynamics 365 across the organisation, reporting remained slow, fragmented and heavily reliant on manual processes. A traditional system upgrade hadn't resolved the problem. Without a consistent, centralised reporting environment, decision-making was delayed and operational oversight was limited.

The Solution:

We deployed the 5Y Business Transformation Platform to centralise reporting, improve operational oversight and simplify access to key metrics across the business. By integrating Dynamics 365 with internal systems and applying a pre-built data model, we created a templated, cloud-based reporting and analytics environment aligned with the organisation's strategic goals. The outcome enabled teams to achieve real-time access to critical data through a single source of truth, replacing slow, manual reporting with governed, consistent insights.

Business Impact

Seamless integration of Dynamics 365 and other core systems

A secure, scalable environment designed for long-term transformation

80+
Self-Serve KPIs

Our Social Commitments

At 5Y, we believe business success goes hand in hand with responsibility. Our social commitments reflect our dedication to people, communities, and the planet.



Fair Work & Well-being

- | Fair pay above the National Living Wage.
- | Flexible working and open culture.
- | Health and well-being initiatives, including mental health support and certified Mental Health First Aiders.



Equality & Inclusion

- | Gender and ethnicity pay gap monitoring.
- | Active Women in Tech group and DEI training.
- | Recruitment practices promoting diversity and accessibility.



Skills & Growth

- | Personal Development Plans for every employee.
- | Annual training allowance and access to global certifications.
- | Apprenticeships and graduate programmes to nurture talent.



Community & Charity

- | Two paid volunteering days per year.
- | Annual charitable giving: A percentage of profit before tax donated to employee-chosen charities.
- | Partnerships with local charities and associations.



Environmental Action

- | Commitment to biodiversity initiatives such as tree planting
- | Working towards Net Zero through carbon offsetting initiatives

Together, we create a positive impact – for our people, our communities, and our planet.



Ethics & Responsibility

- | Mandatory modern slavery, sexual harassment and ethics training.
- | Whistleblowing and grievance policies.
- | Strong safeguarding and compliance processes.





hello@5ytechnology.com

5ytechnology.com