



CRM ONBOARDING AND DATA MIGRATION

Migration

Your data into Salesforce — assessed first, so the price holds.

STEP 1

Assess

\$2,500

1 week

STEP 2

Most popular

Launch

\$9,000

3 weeks

STEP 3

Expand

From \$15,000

Quoted after Assess

Rows and objects do not control risk

Migration projects overrun because of what the data turns out to be, not how much of it there is. Duplicate contacts, orphaned relationships, inconsistent picklists and unowned records cost far more time than volume ever does. That is why every engagement where the source has not been sampled begins with a fixed-price assessment — and why the assessment fee comes off the migration.

Brysa Limited

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THE OUTCOME

What you will have at the end

A Brysa migration moves your records into Salesforce with their relationships, ownership and history intact, and tells you honestly what the data looked like on the way in.

Records in place

Accounts, contacts and related records loaded and linked.

Relationships intact

Parent, child and lookup relationships preserved.

Ownership correct

Every record assigned to a valid, active owner.

A reconciliation

Counts matched between source and destination.

A known-issues list

Anything that could not be migrated, and why.

A repeatable method

Templates and mapping you can reuse later.

Included in every step

- Kick-off and confirmation of the sources and objects in scope
- Brysa migration templates and field mapping documentation
- Validation of record counts and key relationships after every load
- A written summary of anything that could not be migrated and why
- Remote support for the stated period following the production load
- A defined route into ongoing support through a Brysa Care Plan

STEP 0 · REQUIRED WHERE COMPLEXITY IS UNCERTAIN

Migration Assessment

Required wherever the source data has not been sampled by Brysa. One week to profile the source, map relationships and identify duplicate, ownership and completeness risks, ending in a confirmed migration quote. The full fee is credited against any migration commenced within 60 days. It can only be waived where a single clean source has already been sampled and no historic or reconciliation processing is required.

\$2,500

1 week

Credited on proceed

Choose your step

Most engagements begin at Assess. Where a single clean source has already been sampled, Launch can start directly. Expand is priced only after Assess, because multiple sources cannot be safely fixed-priced in advance.

CAPABILITY	STEP 1 · ASSESS	STEP 2 · LAUNCH	STEP 3 · EXPAND
Fixed price	\$2,500	\$9,000	From \$15,000
Best fit	Source data not yet examined	One clean, sampled source	Multiple sources or systems
Source systems or files	Up to 3 profiled	1	Multiple, confirmed at Assess
Objects	Mapped, not loaded	Up to 5	Confirmed at Assess
Volume	Sample profiling only	Up to 25,000 rows	Confirmed at Assess
Data profiling	Completeness, duplication, ownership	Pre-load validation	Full profiling per source
Relationship mapping	Documented map	Preserved on load	Cross-source relationship resolution
Test load	Not included	1 test load	Multiple test loads
Production load	Not included	1 production load	Confirmed at Assess
Reconciliation	Not included	Count and relationship reconciliation	Full reconciliation summary
Data cleansing	Not included	Not included	Not included
Known-issues report	Risk register	Included	Included
Confirmed quote for the migration	Included	Not applicable	Not applicable
Training	Not included	Admin session on templates and reloads	Expanded admin enablement
Support after load	5 working days, up to 2 hours	21 days, up to 6 hours	30 days, up to 8 hours
Typical duration	1 week	3 weeks	Quoted after Assess

All limits are maximums within the fixed-price package and are confirmed in the configuration workbook after discovery.

Migration is not cleansing

Brysa migrates the data you supply. We will tell you plainly what is wrong with it — duplicates, missing owners, broken relationships, inconsistent values — and we will not silently fix it. Cleansing, deduplication and enrichment are separate, and are scoped once the assessment has shown what is actually needed.

STEP 1

Assess

\$2,500

Profile the source before anyone quotes a migration, so the fixed price is based on evidence rather than description.

Typical delivery: 1 week

WORKSTREAM	WHAT BRYSA WILL DELIVER	INCLUDED LIMIT
Source review	— Review of up to 3 source systems or files — Structure, field usage and export capability assessed — Confirmation of what can and cannot be extracted	3 sources
Sample profiling	— Profiling of a representative sample for completeness and consistency — Duplicate detection across the key identifying fields — Ownership and mailability assessment where relevant	Sample-level evidence
Relationship mapping	— Documented relationship map between source entities and Salesforce objects — Identification of orphaned, circular or ambiguous relationships — Field mapping draft for the agreed objects	1 relationship map
Risk register	— Prioritised register of duplicate, ownership, completeness and relationship risks — Clear statement of what would need to be resolved before migration — Recommendation on whether cleansing is required first	1 risk register
Confirmed quote	— A firm fixed price for the migration based on what the data actually is — One findings walkthrough with your nominated stakeholders — Five working days of remote follow-up, up to 2 hours	1 fixed quote 5 working days

STEP 2

Launch

\$9,000

A clean migration from one sampled source, with a test load, a production load and full reconciliation.

Typical delivery: 3 weeks

WORKSTREAM	WHAT BRYSA WILL DELIVER	INCLUDED LIMIT
Preparation	— Kick-off and confirmation of objects, volumes and cutover expectations — Brysa migration templates issued with field mapping documentation — Agreed data freeze and cutover window	1 source 5 objects
Mapping and transformation	— Field mapping across up to 5 objects, confirmed with the client — Standard transformations such as picklist alignment, date formatting and owner resolution — Documented mapping specification for reuse	5 objects 1 mapping spec
Test load	— One full test load into a sandbox or staging environment — Pre-load validation and post-load record count checks — Issue list returned to the client for source correction	1 test load
Production load	— One production load of up to 25,000 rows across the agreed objects — Relationship, ownership and record-count validation after import — Rollback position agreed before the load begins	1 production load 25,000 rows
Reconciliation	— Count and relationship reconciliation between source and Salesforce — Written known-issues report covering anything not migrated and why	1 reconciliation
Enablement	— One 90-minute administrator session covering the templates and how to run a reload — Handover of mapping documentation and templates	1 session
Post-load support	— Remote support for questions, defects and minor corrections within the agreed scope — Continues seamlessly into a Care Plan where selected	21 days 6 hours

STEP 3

Expand

For multiple sources or systems, where relationships must be resolved across datasets. Priced only after assessment.

From \$15,000

Typical delivery: Quoted after
Assess

WORKSTREAM	WHAT BRYSA WILL DELIVER	INCLUDED LIMIT
Assessment prerequisite	— Migration Assessment completed at \$2,500, credited against the migration — Confirmed source list, volumes, objects and relationship complexity — Firm fixed price and delivery plan for the migration	Required \$2,500 credited
Mapping and transformation	— Field mapping across the agreed objects and sources — Cross-source identity resolution so the same entity is not loaded twice — Precedence rules agreed where sources disagree	Confirmed at Assess
Test loads	— Multiple test loads as required by the confirmed plan — Issue lists returned after each load for source correction — Iterative validation of cross-source relationships	Confirmed at Assess
Production load	— Production load per the confirmed plan and cutover window — Relationship, ownership and record-count validation — Rollback position agreed before each load	Confirmed at Assess
Reconciliation	— Full reconciliation summary across all sources — Written known-issues report covering anything not migrated and why	1 reconciliation summary
Enablement and support	— Expanded administrator enablement covering templates, mapping and reloads — Remote support for the stated period following the production load	30 days 8 hours

Add-ons and ongoing care

Where scope needs to stretch, these items can be added at a fixed price and confirmed in the Statement of Work.

Fixed-price add-ons

ADD-ON	FIXED PRICE	TYPICAL EFFECT ON TIMELINE
Additional source system or file	\$1,900	+3 to 4 days
Additional test load	\$1,300	+1 to 2 days
Additional migration object	\$1,000	+1 day
Additional 10,000 rows	\$1,000	+1 day
Historic activity or attachment migration	\$1,900	+2 to 3 days
Additional administrator session (90 minutes)	\$700	No change
Data cleansing or deduplication	Quoted separately	Scoped after Assess

Add-on prices are the same whether agreed at Statement of Work stage or raised during delivery, and are invoiced with the second instalment.

Brysa Care Plans

Data keeps arriving. New sources, periodic reloads, and the inevitable clean-up after a merger or a new system. A Care Plan begins the day support ends and gives you a route to run the next load without starting a new project. For most migrations we recommend Essentials.

	ESSENTIALS	ACTIVE	PARTNER
Monthly fee	\$750	\$1,600	\$3,000
Included hours	Up to 3 hours	Up to 7 hours	Up to 15 hours
Reactive support	Yes	Yes	Yes, priority
Small changes and fixes	Yes	Yes	Yes
Scheduled change window	Not included	Monthly	Fortnightly
Business review	Not included	Quarterly	Monthly
Roadmap and optimisation input	Not included	Not included	Included
Named Brysa administrator	Not included	Not included	Included

Commit at Statement of Work stage

Where a Care Plan is agreed alongside the Quick Start, Brysa applies a 10% discount to the first six months. Care Plans run on a rolling basis with 30 days' notice, and unused hours do not carry forward.

How the migration runs

Brysa follows a fixed sequence so that surprises appear during the test load rather than on cutover day.

1 Assess Profile the source and confirm what the data actually is.	2 Map Agree field mapping, transformations and relationships.	3 Test Load into a sandbox and return an issue list.	4 Correct Client corrects at source; Brysa revalidates.	5 Load Run the production load and reconcile.
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Typical timetable

PERIOD	ASSESS	LAUNCH	EXPAND
Week 1	Profile, map and quote	Preparation and mapping	Assessment
Week 2	Not applicable	Test load and issue list	Mapping and identity resolution
Week 3	Not applicable	Correction, production load and reconciliation	Test loads, per confirmed plan
Week 4 onwards	Not applicable	Support period	Production load, reconciliation and support

When the clock starts

The engagement begins once the Statement of Work is signed, source data or extracts have been supplied in the agreed format, Salesforce administrator access and a sandbox are available, the nominated decision-maker is confirmed and the cutover window has been agreed. Late or partial source data is the most common cause of delay on migrations.

Decision and feedback cadence

- Brysa records all mapping decisions in the migration workbook.
- Issue lists from test loads are corrected at source by the client, not silently by Brysa.
- The client provides one consolidated response to each issue list.
- Requests beyond the agreed scope are priced from the add-on menu where applicable.

Definitions and responsibilities

These definitions exist because migration scope is usually described in rows and objects, which is precisely what does not determine the effort.

TERM	WHAT IT MEANS IN THIS PACKAGE
Source	One system or file set from which data is extracted. Two exports from the same system in different structures count as two sources.
Object	One Salesforce object receiving migrated records, with its own mapping and validation.
Clean data	Deduplicated and complete source data supplied in Brysa templates, with valid owners, picklist values and resolvable relationships.
Test load	One full load into a non-production environment, followed by validation and an issue list returned to the client.
Identity resolution	Determining that records from different sources describe the same entity, and applying agreed precedence rules.
Reconciliation	A documented comparison of record counts and relationships between source and Salesforce after the production load.
Data cleansing	Bulk correction, deduplication or enrichment of source data. Never included in a migration package at any step.
Care Plan	An ongoing monthly service covering support, small changes and, at higher levels, scheduled change windows and review sessions.

What Brysa needs from you

- Source data or extracts supplied in the agreed format by the agreed dates
- Salesforce administrator access and an available sandbox
- A nominated decision-maker empowered to approve mapping and precedence rules
- Correction of issues at source following each test load
- Agreed owner values that map to active Salesforce users
- An agreed data freeze and cutover window
- Named users to validate the test load and provide one consolidated issue list
- Acceptance that Brysa migrates the data supplied and does not silently correct it

What is not included

The following work sits outside all three standard scopes unless it is expressly added to the Statement of Work. Where an item is needed, Brysa will scope and price it separately.

- Salesforce or third-party licences and subscription fees
- Data cleansing, deduplication, enrichment or remediation of incomplete source data
- Extraction from systems that do not provide an export capability
- Historic email, attachment or activity migration unless specifically added
- Ongoing or scheduled synchronisation between systems
- Salesforce configuration, objects, fields or automation to receive the data
- Integration development, middleware or API work
- Apex, Lightning Web Components or other bespoke code
- Archiving, retention policy or data governance programme design
- Any guarantee that data quality issues present at source will not persist

Support, defects and additional requirements

AREA	HOW IT IS HANDLED
Included hypercare	Remote support during UK business hours for questions, agreed-scope defects and minor corrections, limited to the package allowance and period.
Defect	An agreed item does not operate in accordance with the approved configuration workbook or acceptance criteria. Defects are corrected at no additional cost.
Enhancement	A new feature, changed process, additional report, new automation or other requirement not approved in the package scope.
Additional scope	Brysa will explain the impact and provide a fixed price from the add-on menu or a separate estimate. No chargeable work begins without written approval.
Client delay or pause	Delivery dates move where information, access, data, testing or decisions are delayed. A project paused for more than 20 working days may require re-planning.

Commercial terms and next steps

TERMS	
Fixed prices	Assess \$2,500 · Launch \$9,000 · Expand from \$15,000
Assessment credit	The Assess fee is credited in full against any migration commenced within 60 days.
When Assess is required	Assess is required wherever the source has not been sampled by Brysa, more than one source is in scope, or historic and reconciliation processing is needed.
Payment	50% on commencement and 50% on completion of the production load.
Care Plans	Billed monthly in advance from the day support ends. Rolling term with 30 days' notice.
Acceptance	The migration is accepted on delivery of the reconciliation summary, or five working days after the production load if no material issue has been reported.
Validity	All prices are in US dollars and are the total professional services fee for the agreed scope. Valid for 60 days from the date of issue.

Select the right starting point

Assess

Choose this when nobody has yet examined the source data in detail.

Launch

Choose this when one clean source has been sampled and the scope is confirmed.

Expand

Choose this when several systems or files must be combined into one picture.

Let us confirm the right starting point

Every migration begins with a short, no-obligation call. It takes about thirty minutes and confirms three things: how many sources are really in scope, whether an assessment is required before pricing, and what we would each need to have ready before the clock starts.

Next step

Brysa will hold a short suitability call to confirm the sources, whether an assessment is required and the access needed. We will then issue the Statement of Work and agree the start date.

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This document describes Brysa's standard CRM Onboarding and Data Migration packages. The signed Statement of Work governs the engagement.