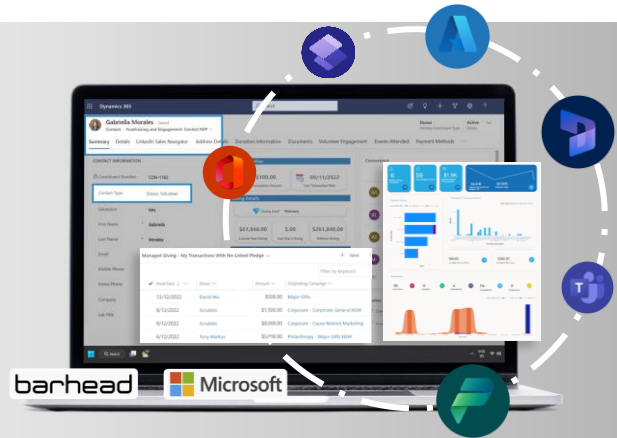# Data Migration Assessment

Enable your organization to make data-driven decisions with the guidance of experienced professionals.

The Data Migration Assessment gives you a comprehensive review of your organization's current data sources, the amount of data available, and the organization's data needs across all areas

Core Activities

Pre-Workshop Discovery Call
A 90-minute discovery call is scheduled prior to the workshop to examine the NFP's current data sources and to gain insight into the quantity of data they possess, as well as their data requirements throughout the organization.

Review Current Data Estate
A comprehensive evaluation of the data estate, donor insights, and data requirements is necessary. The objective is to ascertain the overall data estate needed to gain donor insights.

Educating the NFP on Data and NFP Common Data Model
To demonstrate donation workflows and illustrate the usability of MC4N, an introduction and recommended protocols for utilizing the NFP Common Data Model sources and data imports are provided.

### Dataverse, Data Warehouse, Customer Insights and Understanding the Best Data Strategy
A session focused on innovation will explore ways to capitalize on the latest technologies such as Dataverse and Data Lakes to construct data environments that are future-proof, providing the NFP with valuable insights and benefits from their data.

Data Strategy Presentation
A one-hour presentation will be conducted to formulate a plan for the NFP to comprehend the necessary measures for upgrading and transferring their data estate. The Data Migration Plan will be documented.
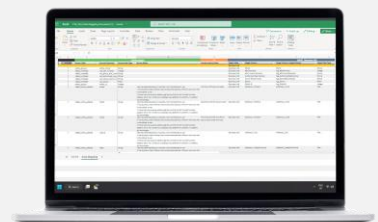
Key Features
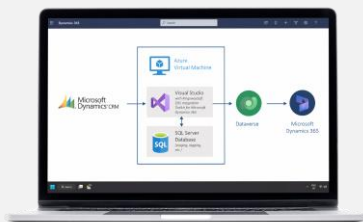
Understand the Best Data Strategy
A session focused on potential methods to leverage the latest technologies such as Dataverse and Data Lakes.

Presentation of Data Strategy
Understand the essential steps involved in upgrading and transferring the organization's data estate.

**Comprehensive Review of Current Data**
Assessment includes conducting a thorough analysis of the data estate, donor insights, and data needs.

Typical Scenarios

✓ NFP organisations that need to improve internal processes and increase donor engagement through automation and data-driven insights

✓ Organisations that need to scale or expand CRM functionality

✓ Organisations that need to recruit more volunteers and sponsor participation

✓ Donors that require greater transparency

Business Outcomes

✓ Boost fundraising effectiveness and increase engagement activities

✓ Manage donor and supporter relationships effectively

✓ Capture inquiries and referrals that are beneficial to the overall program

✓ Communicate and promote volunteering activities on a larger scale

✓ Create a wider impact on communities involved
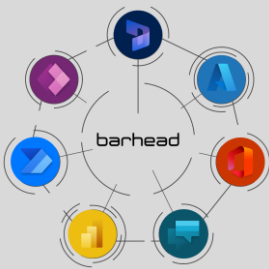
Barhead is a specialised consulting firm focused on delivering business solutions leveraging the strategic value of Microsoft Business Applications through Dynamics 365 and Power Platform. We believe that it is a combination of people, technology, and business drivers that underpin the most successful implementations.

Barhead provides global support for customers, providing deep expertise around:

| Power Platform tools – Power Apps, Power Automate, Power BI and Power Virtual Agents. | Business solutions for standalone apps, or apps that extend existing Microsoft solutions. | Pre-built solutions from Barhead's Research and Development team. | Deployment models, best practices and governance. |

Contact us at www.barhead.com for any inquiries or questions.