

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

# CRM Onboarding & Data Migration Quick Start

*Launch Salesforce cleanly with structured onboarding and migration.*

# brysa





We are Brysa

# brysa

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Of Spanish origin meaning “Breeze”.  
A Personalisation, Operational automation,  
and Salesforce modernisation company.



## Our Expertise

At Brysa, we specialise in enabling organisations to unlock the full potential of Salesforce. Our quick start packages are designed to help you get up and running swiftly and cost-effectively.

## Our Approach

We understand the importance of seeing a return on your investment quickly. Our structured methodology eliminates the uncertainties often associated with traditional engagements.

## Our Promise

Exceptional quality, tailored to your needs, delivered on time and within budget.



## Package Overview

Move into Salesforce with a controlled onboarding approach, clear data templates and practical migration guardrails designed to get both users and data ready together with **Brysa CRM Onboarding and Data Migration Package**.

Ideal for first-time Salesforce customers or teams replacing spreadsheets or a lightweight CRM.

Fixed-price delivery with capped data volumes, clear object limits and one coordinated cutover plan.

Includes onboarding sessions, one test load, one production load and 21 days of support.

**£5,000 excl Tax**



#### Discovery and Onboarding

- Process and user workshop
- Migration workbook
- Duplicate-risk review
- Owner and role planning

#### Preparation

- Templates for 5 core objects
- Standardisation rules
- Picklist and owner alignment
- Relationship checks

#### Migration Execution

- Up to 25,000 rows
- 1 test load
- 1 production load
- Validation checks

#### Cutover Support

- Go-live issue triage
- Immediate data corrections
- Ownership checks
- Cutover sign-off

#### Training and Hygiene

- Admin / super-user session
- End-user onboarding
- Future import guidance
- Handover checklist

#### Commercials and Scope

- Fixed £5,000 exc VAT
- 3 weeks implementation
- 8 hours of support (21 days)



## What is not included?

While our package is comprehensive, some elements are **outside the scope**.

However, for these additional features, our team can work with you to create custom solutions.

### Features that are not a part of this Package:

- Major Salesforce data-model redesign
- Legacy decommissioning or retention-policy work
- Complex activity history migration from multiple tools
- Third-party enrichment or cleansing procurement
- Full change-management programme



Prerequisites

To ensure smooth implementation, we require

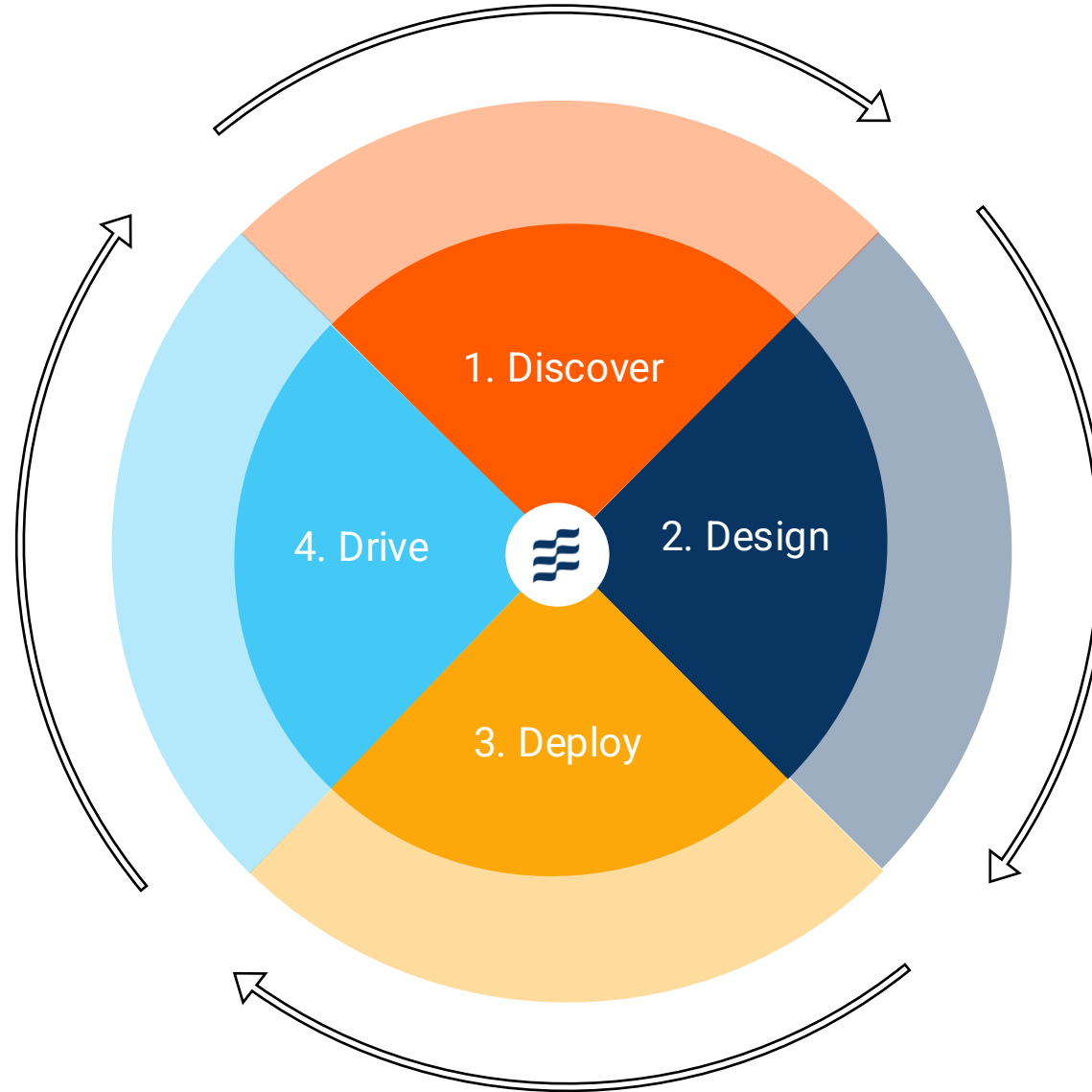
Signed Statement of Work (SoW) with Brysa.

Clean Salesforce environment, licences and user list confirmed.

Source data supplied in agreed templates by agreed dates.



# The Brysa Way

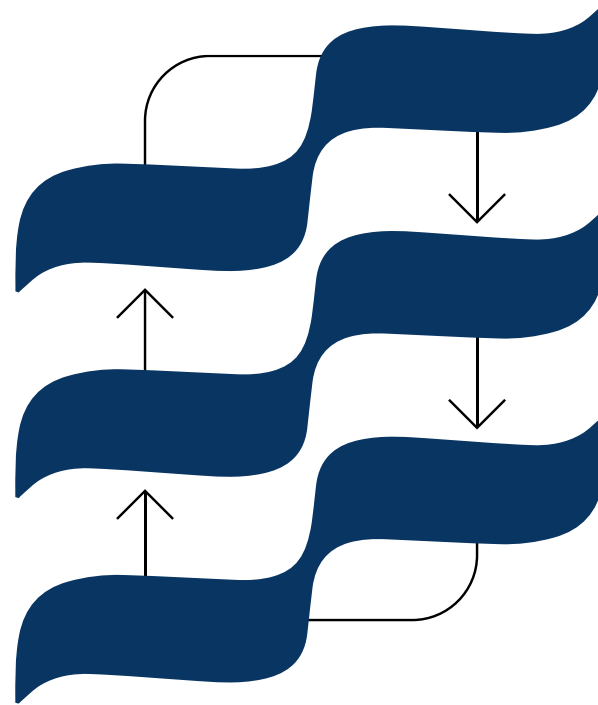


As trusted Salesforce experts, Brysa is committed to delivering excellence.

Our experienced consultants coupled with a client focused approach make us the partner of choice for organisations looking to achieve Salesforce success.



We call this the  
**Brysa Effect.**



Automated operations.  
Systems harmonised.  
Technical debt reduced.  
And employees in **flow**, embracing  
an AI-powered world.



Who Am I?



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