

How to Clean Your Data When You Don't Have a Data Team

Doing More With Less

Welcome: Lunch and Learn



- 30-minute session
- 15-minute open discussion
- Light and easy
- Take at least one action
- The recording will be available on our website
- Introductions

Context

- We have started the ERP implementation
- We hear about Data Migration
- We feel lost

Why should we care?

Data is the blood of our organisation

Data Migration is complex, expensive and painful

Data Migration is highly dull, yet equally important

A few easy ways

Deploy	Deploy a dedicated Data Migration Team
Outsource	Outsource to an agency
Negotiate	Negotiate a fixed price with the ERP vendor

But it is going to be expensive!



Fundamentals of Data Migration

- Not all data elements are equally important
- Data dependencies are real
- Not all data needs to be migrated
- Data can be cleaned and migrated post go-live
- All data elements do not need to be cleaned equally
- Data elements are broad, deep and scary sometimes
- Without scope, we are all lost
- It is refinement and not perfection practice. So, iterations should start early

Keywords

Priority

Dependency

Scope

Ownership

Plan

MVP

So, what does that mean?

- We need a strategy
- We need a schedule
- We need ownership
- We need tools
- We need governance



Strategy: Data Migration

- Why? Purpose and Success criteria
- What? Scope, Source & Destinations systems
- How? Methods and tools
- When? Timing based on the Project Schedule
- Who? Role & Responsibility



Strategy: Example

Purpose: *100% in-scope data migrated, ≥99% validated accuracy, financial reconciliation confirmed (0 variance), and formal business sign-off completed.*

Scope: *No historic transactional data, Finance (COA, balances), Customers, Suppliers, Parts migrated from legacy systems/spreadsheets into the new ERP.*

Methods: *Iterative extract–cleanse–map–load–validate approach using templates, ETL/scripts, and reconciliation controls.*

Timing: *Sequenced with project phases—COA first, then master data, with parallel cleansing and multiple mock migrations before cutover.*

Role & Responsibility: *Lean team—Data Lead (governance), SMEs (rules/validation), Technical (execution), PM (coordination).*

Schedule: Data Migration

Task	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Finalise CoA	Accountant					
Cleansing: Customers	AR Admin (10%)	AR Admin (10 %)	AR Admin (10%)			
Map Customers		AR Admin (20%)				
Iteration 1			AR Admin (20%)			
Iteration 2				AR Admin (10%)		
Migrate to Prod.						AR Admin (10%)

Ownership: RACI

Data Domain	Accountant	AR Admin	AP Admin	Director CS	Project Manager	Vendor	Director Infrastructure
CoA	R			A	I	I	C
Customers		R		A	I	I	C
Suppliers			R	A	I	I	

Governance: Example

Data Domain	Percentage Complete	Owner	Ontrack (Y/N)	Risks
CoA	50%	Accountant	Y	No risk to the project schedule
Customers	10%	AR Admin	N	Minor risk
Suppliers	30%	AP Admin	N	High risk and requires escalation during the next Steer Co.

Closing thoughts

- Data Migration is a discipline, not a task
- It starts before the project
- The most efficient way is to have a plan

