

## Statement of Work (SOW) - Data Conversion (Priava to Elite) One-Time Services

### Project Summary

Provider will work with Customer to complete the following as a part of this project:

Migration of data from an existing Priava instance into a new instance of Elite as part of an Elite onboarding, covering key data types, including Organizations, Contacts, Events, Opportunities, Venue Event Catalogue, Price Schedules, and Tasks.

### Assumptions

Provider's standard migration tooling will be used to transfer data from Priava to Elite.

The data migration will occur in parallel with an onboarding to Elite, managed as part of either a Cohort or One-on-One implementation.

The customer will have licensed access to the Priava database for export.

An Elite Sandbox environment will be made available for testing and validation.

Standard data mappings will be followed as per the provided data mapping documentation.

Any data limitations due to system differences will be documented and communicated to stakeholders.

### Limitations

Unsupported data includes:

- Custom fields
- Documents
- Finances
- Rental price schedules will be migrated over with zero values.
- Sub-events

Large data sets may cause conversion timeouts and delays in the migration process.

## Scope of Services

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### Kick Off

**Provider Responsibility:**

- Internal handover and preparation to incorporate a Priava Data migration into Customer's Elite onboarding.

**Customer Responsibility:**

- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resource planning.

### Design

**Provider Responsibility:**

- Identify the key data elements for migration.
- Specify data mappings for each supported data type, including:
  - Organizations & Contacts: Mapped based on name, email, phone, and address.
  - Events & Opportunities: Mapped by event name, date, venue, and customer association.
  - Venue Event Catalog: Venue details, capacity, and availability.
  - Price Schedules: Standard pricing structures, converted with adjustments for Elite's model.
  - Tasks: Assigned users, due dates, and task statuses.
- Inform Customer of constraints and limitations of data migration, including difference in data types and data unable to be migrated.
- Outline migration workflow, including export, transformation, and import steps.
- Confirm error handling and logging mechanisms.
- Communicate any performance concerns for large data sets.

**Customer Responsibility:**

- Review proposed data mappings and recognize any data migration limitations.
- Develop any strategies or processes required to deal with changes in data types or data unable to be migrated.
- Identify any custom data requirements, environmental issues including integrations, or business rules that may impact migration.

### Build

**Provider Responsibility:**

- Execute the Priava Export tool to extract data from the Priava database.
- Execute the Elite Capsule Data & Saved State package.
- Execute the Capsule Import process for Elite.
- Set up necessary configurations for the migration tool in the Elite Sandbox environment.
- Validate transformation logic to ensure proper alignment with data mappings.
- Provide an understanding of data which will require manual transformation and cleansing.

**Customer Responsibility:**

- Provide timely feedback on data extraction and transformations as needed.
- Ensure internal teams are available for any necessary clarifications.

## Testing

**Provider Responsibility:**

- Execute one (1) test migration in the Sandbox environment.
- Validate successful data migration for each data type.
- Address identified issues, including data mismatches.
- Document test results and confirm successful migration paths.
- Verify adherence to predefined data mappings and transformation rules.

**Customer Responsibility:**

- The Customer is responsible for preparing for and executing user testing and validating migrated data.
- Promptly report any discrepancies or concerns with the migrated data within the agreed timeframe to ensure no delays to the migration and/or the Elite onboarding.

## Launch

**Provider Responsibility:**

- Execute the migration in production environment as designed and tested.
- Provide updates and communicate the migration process to customers.
- Monitor initial migrations and provide post-migration support for any issues.
- Gather feedback.

**Customer Responsibility:**

- Confirm that final production migration has been successfully completed.
- Report any post-migration issues within the agreed support window.
- Provide feedback on the migration process for future improvements.
- Perform data cleansing and transformation activities as advised.

## Project Management

**Provider Responsibility:**

- Coordination of resources, activities, meetings in alignment with timelines and milestones of the existing Elite onboarding project.

**Customer Responsibility:**

- Nominated project lead.
- Coordination of activity and resources on customer side to align to project plan and schedule.

## Exclusions

- Any service not listed above.
- Any Provider actioned changes in Priava or Elite.
- Any considerations for current, former or planned integrations.
- Data import and/or migration outside of what is included with the standard tooling. Customizations or enhancements to the data migration tool beyond its standard capabilities are not included.
- Data transformation, cleansing and normalization of any kind.
- Resolution of pre-existing data integrity issues in the source system.
- Data quality improvements beyond the scope of migration-related activities.
- Data reconciliation beyond the initial validation phase.
- Management and coordination of any third-party software provider(s).
- The following data types are not included:
  - Financial data
  - Sub-events
  - Custom fields
  - Multiple price schedules
  - Documents
- Comprehensive security audits and adherence to specific compliance standards unless explicitly outlined. Additional security measures may be subject to a change order.
- Any legal or regulatory changes that occur during the project lifecycle. Customer is responsible for any adjustments needed to meet new requirements.

## Project Schedule

The estimated timeline for this project is based on the estimated timeline for the associated Elite onboarding and implementation. However, Provider and Customer will create and agree to a joint project plan in writing (email acceptable). The plan is *an estimate* and subject to change.