Roles in Migration Process

Professional Services

- Monitor clients that have a migration on a renewal or amendment via Salesforce reporting
- Test migrations
- Report any failed migrations
- Schedule and record Desktop and Rubex Private Cloud migrations on the client Migration Order, as they need to be in person with the client
- Perform all Legacy product migrations (EFCO, Desktop, SecureDrawer, Rubex Private Cloud)

Growth CAE Team (will handle the bulk of Legacy Migrations)

- Speak with Legacy clients regarding migration
- Schedule and record all EFCO migrations on the client's Migration Order
- Use the [Migration Dashboard](#) to ensure all migration clients have a scheduled date
- Problem solve issues around migration

Strategic CSM Team

- Speak with Legacy clients regarding migration
- Schedule and record all EFCO migrations on the client's Migration Order
- Use the [Migration Dashboard](#) to ensure all migration clients have a scheduled date
- Problem solve issues around migration

Revenue Team

- Monitor SFDC reporting for clients with a scheduled migration date
- Provision a Rubex account for those clients with a scheduled migration date

---