



Data Platform Modernization

From Legacy to Modern: Your Data Platform Migration Strategy Guide

Practical frameworks, real case studies, and actionable roadmaps for confident migrations

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About Me

25+ Years in Data & Analytics

Helping enterprises migrate to and scale on Microsoft Fabric – from architecture and data modeling to Power BI and production governance.

→ Creator/Founder: SQLBites Community

Building the next generation of data practitioners.

→ Migrating Enterprises to Fabric

Real production migrations across healthcare, finance, retail, and manufacturing.

→ Hundreds of Technical Talks Globally

International speaker on data architecture and analytics engineering.



Jonathan Stewart

PRINCIPAL ANALYTICS CONSULTANT, SOUND BI

25+ Years in Data & Analytics

Deep hands-on experience across the full data platform lifecycle — from architecture design to enterprise-scale delivery.

Enterprise Migration Specialist

Led migrations across healthcare, finance, manufacturing, and retail. Every industry brings unique complexity and compliance demands.

International Conference Speaker

SQLBits, Data Saturday, PASS — sharing practical frameworks with the global data community. Session recordings available at speaker profile.

Microsoft Fabric Early Adopter

Creator of SQLBites Community (sqlbites.net) and one of the earliest practitioners in Fabric migrations.

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- ❏ **Disclosure:** Sound BI is a consulting firm specializing in Microsoft Fabric migrations. The frameworks in this session are platform-agnostic; the case studies and deep expertise reflect our Fabric practice.

The Case for Migration in One Slide

The Problem

Legacy data platforms cost enterprises **\$780K–\$1.97M/year** in total ownership costs, with **40–50% of data team time** spent on maintenance instead of value creation.¹

The Solution

A structured, wave-based migration to a modern data platform — using a proven **5-phase framework** that delivers first business value in **6–8 weeks**.²

The Evidence

Across our engagements, platform migrations have delivered **55–65% TCO reductions**, with payback periods of **6–18 months** depending on complexity.³

The Ask

Score your current platform using our assessment scorecard this week. If you score **above 14 out of 20**, your migration conversation is already overdue.

¹ TCO range: see full breakdown in Chapter 7. Maintenance time: Sound BI assessment data, N=20+ engagements. ² "First business value" = first migrated workload live in production. ³ Sound BI engagement data, N=12 platform migration projects (2019–2025).

What We'll Cover Today

Eight chapters — from burning platform to 90-day action plan

#	Chapter	Focus
1	The Migration Imperative	Why staying put costs more than you think
2	Current State Assessment	Four dimensions every migration starts with
3	Platform Selection	Decision matrix for Fabric, Snowflake, Databricks & more
4	Migration Patterns	Three strategies — and why big-bang fails
5	Risk & Change Management	Continuity, governance, and people
6	Case Studies	Healthcare, manufacturing, and financial services
7	Building the Business Case	TCO, ROI, and getting exec sign-off
8	Your 90-Day Roadmap	Leave with templates and decision matrices

Quick Poll

Let's calibrate — where is your organization right now?

01

A —Not Started

We haven't started thinking about migration

02

B —Aware, Not Planning

We know we need to migrate but haven't started planning

03

C —Evaluating

We're actively evaluating platforms

04

D —Mid-Migration

We're mid-migration and looking for better frameworks

05

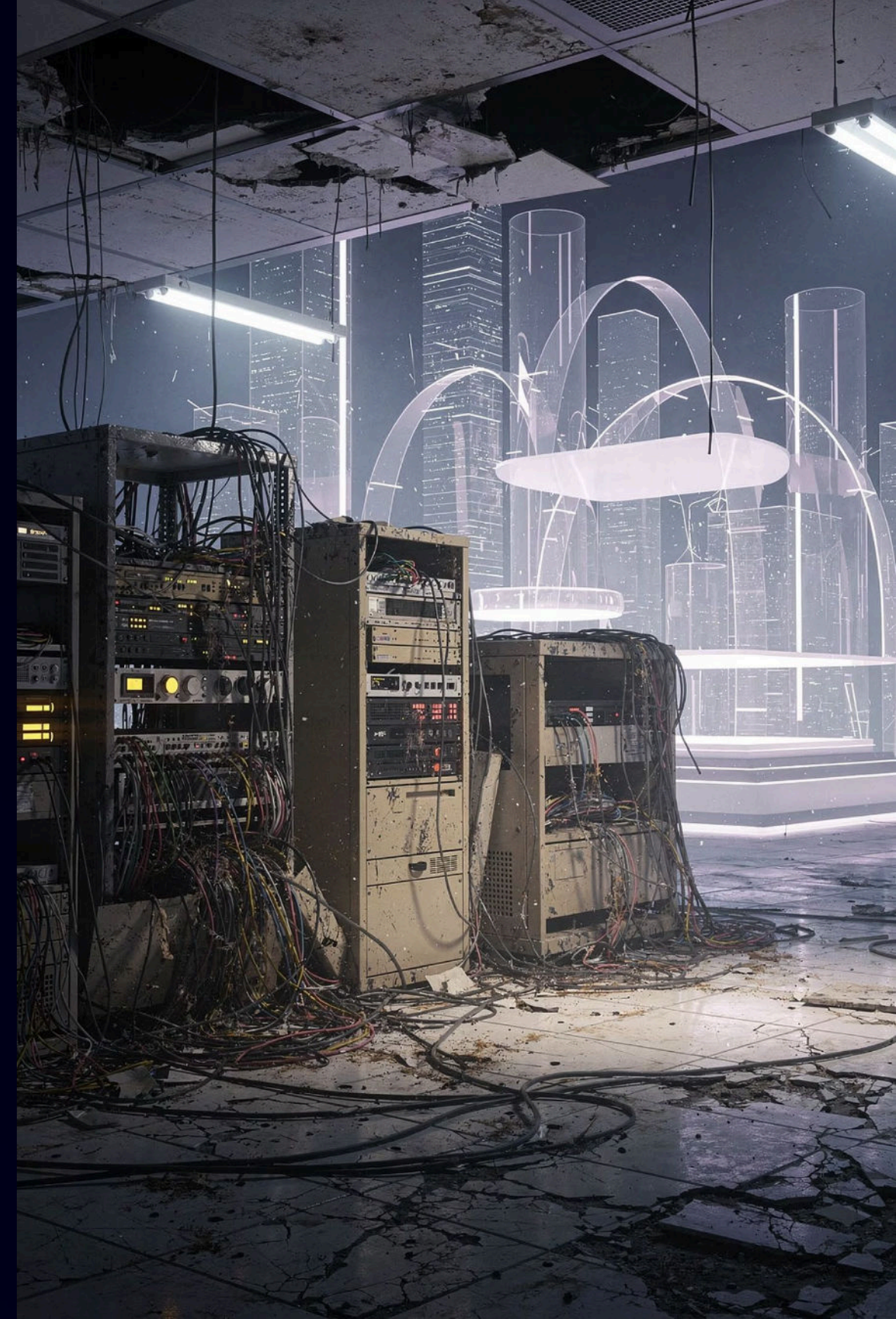
E —Post-Migration

We've migrated and want to validate our approach

CHAPTER 1

The Migration Imperative

Why staying put is the most expensive decision your organization can make



The Cost of Staying Put

Legacy platform costs are hidden, compounding, and underestimated – until they're not

Metric	Value	Context
Annual Cost Inflation	8–12%	Maintenance cost growth on aging infrastructure, year over year (Gartner/IDC)
Avg. Annual Legacy Cost	\$780K–\$1.97M	Enterprise SQL Server, 500GB–5TB – all-in platform cost
Break-Fix Time	~50%	Data teams spending roughly half their time on patching and reactive maintenance
Unstructured Migration	12–24+ months	Average time to migrate without a structured framework – longer with compliance

📌 **Hidden cost:** Most organizations only count licensing. They forget DBA time, downtime risk, integration debt, and the reports nobody can build.

Warning Signs Your Platform Is Failing

If you recognize three or more of these, your migration conversation is already overdue

Operational Red Flags

- Nightly batch jobs regularly exceed their maintenance window
- Reports break after every patch Tuesday
- You can't answer a simple question without a 3-day turnaround
- Your DR plan hasn't been tested in over a year
- New feature requests go into a backlog that never shrinks

Business & Talent Red Flags

- Your best engineers are leaving — and citing technical debt
- Business users have built shadow systems in Excel or Access
- Compliance reporting requires weeks of manual effort
- You're paying for licenses on servers nobody can explain
- Storage costs are growing faster than data value



A Real Client Story

Mid-size manufacturing firm, SQL Server 2012, four data silos, \$1.8M/year — and a burning platform

Before

- 3-day data lag — operations flying blind
- ERP, CRM, MES, Finance in separate silos
- \$1.8M/year all-in platform costs
- 14-hour nightly refresh window
- 2 senior engineers quit — cited technical debt
- Compliance reporting: 4-week manual process

After —9 Months

- Near-real-time dashboards — 15-minute maximum data latency
- Unified lakehouse on Microsoft Fabric
- \$680K/year — **62% cost reduction**
- 14-hour nightly batch window eliminated
- Engineers re-engaged — building new features
- Compliance: automated, continuous

Based on a composite of manufacturing client engagements. The framework made the difference — not just a cheaper platform, but a fundamentally more capable one.



When NOT to Migrate

A responsible framework tells you when to stay, not just when to go

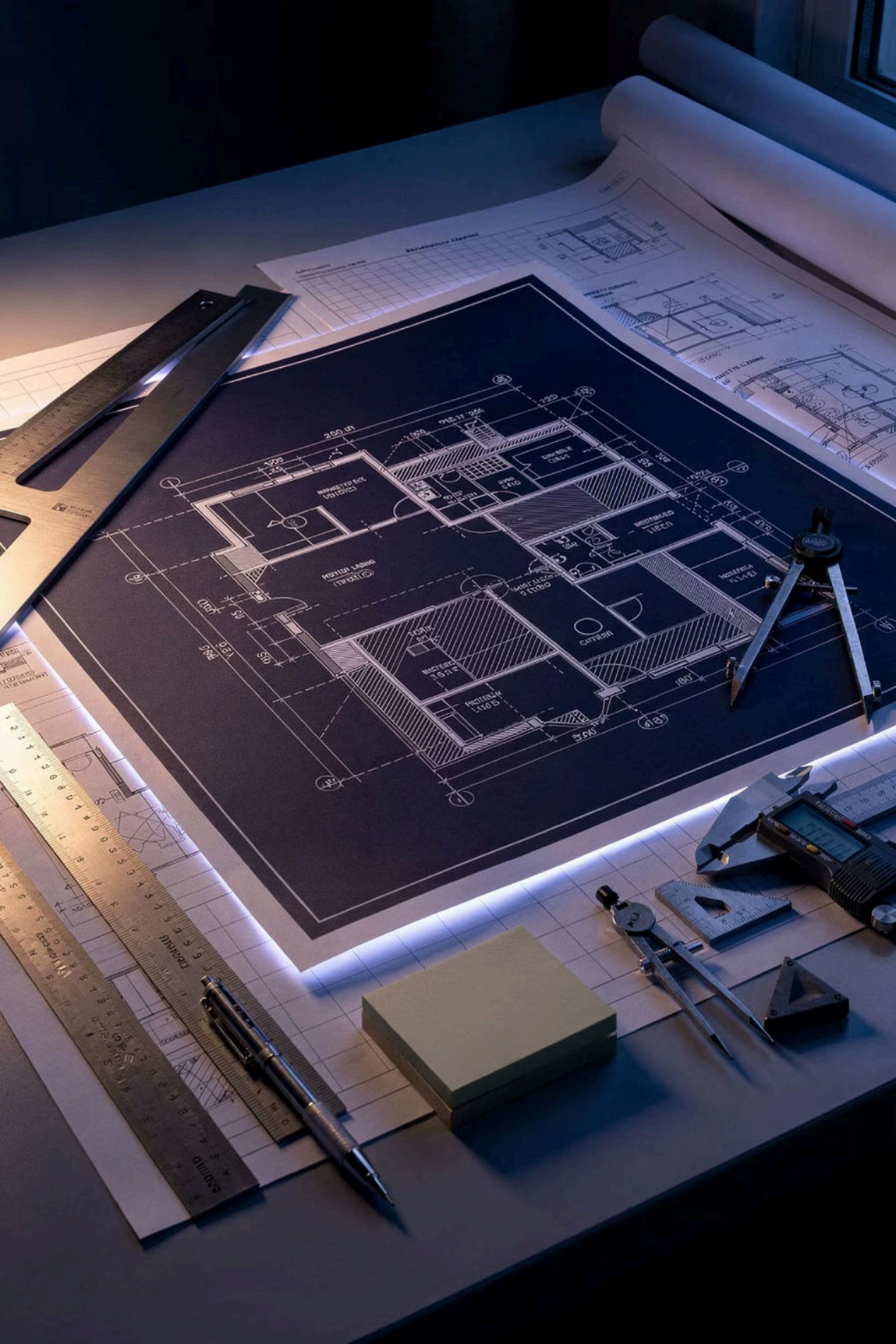
Don't Migrate If:

- Your platform scores below 8/20 on the assessment scorecard — targeted tuning is more cost-effective
- You're within 12 months of a major regulatory audit without bandwidth for both
- Your total data footprint is under 100GB with stable, predictable workloads
- You have no executive sponsor willing to own the outcome
- Your team has zero cloud skills AND zero budget for training

Migrate Later (Not Never) If:

- You're mid-ERP implementation — don't stack two transformations
- Key-person dependency is critical and you can't cross-train first
- Your compliance framework doesn't yet cover cloud — get legal alignment first

The honest truth: About 20% of organizations we assess aren't ready to migrate yet. That's a valid outcome — the assessment surfaces it, rather than selling something you don't need.



CHAPTER 2

Current State Assessment

You cannot plan a migration without knowing what you're migrating from — in full detail

Four Dimensions of Assessment

A structured assessment surfaces hidden complexity before it becomes a production incident



1. Technical

Object inventory (tables, views, procs, jobs), data volumes, schema complexity, dependencies, undocumented integrations, custom CLR assemblies. Use automated discovery tools — DMA and Azure Migrate — as your starting point.



2. Operational

Peak query profiles, SLA requirements, batch window constraints, concurrency patterns, data freshness expectations by business unit. Real complexity lives here — not in the schema, but in the behavior.



3. Financial

Full-stack cost: licenses + SA, hosting/hardware, DBA & ops labor, downtime risk (revenue impact per hour), integration maintenance. Partial cost models create arguments — complete models create decisions.



4. Organizational


Internal skills inventory, key-person risk, stakeholder map (champions vs. blockers), change history, prior migration attempts. The org dimension predicts success as reliably as the technical one.

Download: The assessment template used with every client is in the session materials — 47 questions across these four dimensions.

Scoring Your Architecture

A simple scoring model lets you compare current state across teams and prioritize migration waves

Dimension	Score 1 – Poor	Score 3 – Adequate	Score 5 – Good
Data Freshness	Days	Hours	Minutes
Scalability	Manual scale-up	Cloud lift-and-shift	Elastic / serverless
Dev Agility	Weeks per change	Days per change	Hours per change
Ops Cost	High + rising	Stable	Declining
Talent Retention	Losing people	Neutral	Attracting talent

 **Note:** These 5 criteria map to the detailed 47-question assessment. This is the summary view – use the full scorecard in the session materials for the complete picture. A score above 14/20 means your migration conversation is already overdue.

What You'll Discover

Every assessment surfaces surprises – knowing which surprises to expect reduces the shock

→ Shadow Integrations

Apps connecting directly to your DB that nobody documented. Based on N=20+ assessments, expect 20–40% more connections than your team believes exist. A dependency map is non-negotiable.

→ Skill Gaps & Quick Wins

The team that built the current system has moved on – institutional knowledge lives in undocumented code. But reporting databases and archive tables often migrate cleanly in days – run these first to build confidence.

→ Zombie Objects & Data Quality Debt

Tables and procedures untouched for years – still risky to remove without a formal retirement process. Columns that mean different things in different systems only surface when you try to unify them.

→ Cost Surprises

Unused SQL Server licenses and oversized hardware generate credits that can fund part of the migration itself. Most organizations discover 15–25% in recoverable spend during assessment.

📄 **Expectation setting:** Tell your stakeholders upfront that assessment will find surprises. Surprises found early are features – found late, they're crises.



CHAPTER 3

Platform Selection

The wrong platform choice is expensive to reverse — here is how to get it right the first time

The Platform Landscape

Three categories define where modern data platforms compete — understanding where you fit is the first decision

Cloud Data Warehouses

Structured analytics, SQL-first, BI workloads. Best for organizations with large, predictable query patterns and strong SQL skills.

Platforms: Redshift · Synapse · BigQuery · Fabric Warehouse · Snowflake

Lakehouse Platforms

Unified structured + unstructured, open formats (Delta/Iceberg), ML-ready. Best for data science-heavy orgs and streaming workloads.

Platforms: Databricks · Microsoft Fabric · Snowflake (hybrid mode)

Hybrid Cloud Engines

On-prem plus cloud burst capacity, compliance-driven architectures. Best for regulated orgs that cannot fully exit the datacenter.

Platforms: SQL Server 2022 + Azure Arc · Oracle Exadata Cloud@Customer

📌 **The Trend:** Warehouse and lakehouse are converging. Most orgs need both — plan for a unified layer, not a replacement.

Evaluation Criteria

Score each criterion 1–5 for your organization – then weight by strategic priority. Weighting matters more than the scores.

Technical Fit

- SQL compatibility and performance at your volume
- Concurrency model and connector ecosystem
- Governance & security model depth

Organizational

- Team skill alignment and retraining burden
- Vendor support quality and SLA commitments
- Change management burden at your org

Commercial

- TCO at 3 years – full stack, not just licensing
- Pricing predictability and enterprise agreement leverage
- Exit/portability risk and data egress costs

Strategic

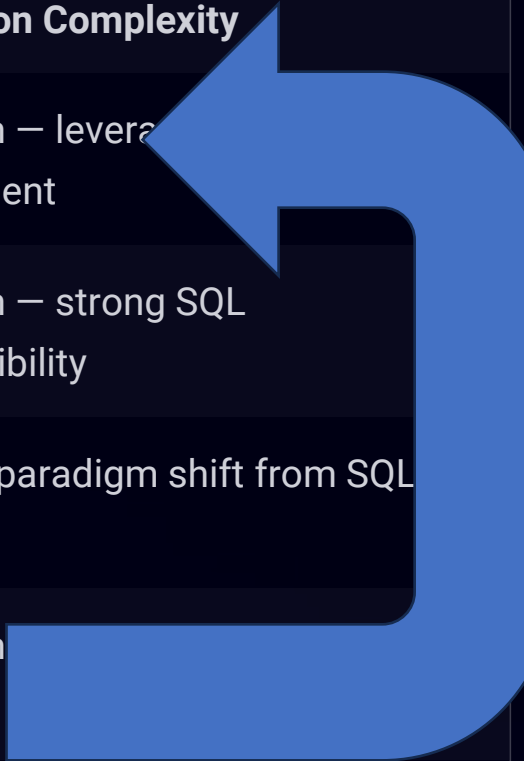
- Roadmap alignment and AI/ML maturity
- Cloud vendor alignment (AWS/Azure/GCP)
- Partner ecosystem and long-term viability

A healthcare org will weight governance 3× vs. a startup weighting agility. The same platform can score first or last depending on your weights.

Decision Matrix: Which Platform?

A framework for matching platform strengths to organizational needs

Platform	Best For	Watch Out For	Migration Complexity
Microsoft Fabric	Microsoft shops, Power BI-heavy, unified analytics	Maturing ecosystem, some SQL compatibility limits	Medium – leverage existing investment
Snowflake	Multi-cloud, SQL-heavy analytics, data sharing	Compute costs at scale, proprietary format lock-in	Medium – strong SQL compatibility
Databricks	ML/AI-heavy, data science teams, streaming	Complexity for pure BI, steep learning curve	High – paradigm shift from SQL first
Azure Synapse	Hybrid on-prem/cloud, existing Azure footprint	Uncertain roadmap (Fabric convergence)	Medium
Amazon Redshift	AWS-native, BI-heavy, predictable workloads	Concurrency limits, less flexible scaling	Medium – requires AWS commitment
Google BigQuery	GCP shops, serverless preference, ad-hoc analytics	Ecosystem gaps outside GCP, data gravity concerns	Medium-High – GCP ecosystem required



When Each Fits

Scenario-based guidance – match your situation to the right recommendation

Your Situation	Recommended Platform	Why
Heavy Power BI investment, Microsoft EA in place	Fabric	Native integration, EA leverage, unified analytics
Multi-cloud strategy, strong SQL skills, data sharing needs	Snowflake	Cloud-agnostic, SQL-first, zero-copy sharing
Data science team driving the migration, ML/AI priority	Databricks	ML-native, notebook-first, streaming support
Hybrid requirement, can't fully exit datacenter	Azure Synapse + Arc	On-prem + cloud burst, familiar SQL surface
All-in AWS, BI-centric workloads	Redshift	AWS-native, BI-optimized, RA3 instance flexibility
GCP shop, serverless preference, ad-hoc heavy	BigQuery	Serverless, pay-per-query, separation of storage/compute



CHAPTER 4

Migration Patterns

How you migrate matters as much as where you migrate to — pattern selection determines risk and speed

Three Migration Strategies

Understand the trade-offs before you commit – changing strategy mid-migration is expensive

Lift & Shift —Fast / Low Risk

- **Pros:** Fastest time to cloud, minimal retraining, lower initial budget, easy rollback
- **Cons:** Cloud costs often higher initially, technical debt migrates too, limited performance gain

Refactor —Balanced ★ Recommended

- **Pros:** Modernize highest-ROI objects, significant performance gains, reduced ongoing costs
- **Cons:** Longer timeline, requires SQL + cloud skills, partial systems in two places

Reimagine —High Impact

- **Pros:** Cloud-native architecture, maximum long-term ROI, fully modern patterns
- **Cons:** Highest cost and time, significant change management, regression risk

Default to Refactor for most organizations. Reserve Lift & Shift for time-constrained datacenter exits. Reserve Reimagine for greenfield or when technical debt truly cannot be carried forward.

The Five Phases

Every successful migration follows this sequence – skipping phases creates debt you pay later



Total timeline varies by complexity – our case studies range from 9 months (manufacturing, 4 plants) to 22 months (financial, SOX+FINRA compliance). Structured frameworks compress timelines 30–50% within each wave compared to unstructured approaches.

Pilot Project Selection

Your pilot workload is the most important decision in the migration – choose with precision

Good Pilot Characteristics

- Medium complexity – not too simple, not mission-critical
- Clear success criteria – measurable before/after comparison
- Visible to stakeholders – builds organizational confidence
- Representative of future waves – proves the pattern
- Has a willing business owner – your first champion

Bad Pilot Choices

- The easiest thing you can find – proves nothing
- Your most critical production system – too much risk
- Something nobody uses – no organizational impact

In the Manufacturing Case

The pilot was a reporting database – complex enough to be representative, visible enough to generate excitement, and safe enough that a rollback wouldn't impact production.

Avoid the Big-Bang Trap

The temptation: migrate everything at once. The reality: it almost never works.

Big-Bang Approach ✗

- Everything fails at once — no isolation
- Rollback means restoring the entire old system
- Business interruption at maximum scale
- Team burnout — months of sprint with no visible wins
- Stakeholder trust destroyed on first slip

Wave Migration Approach ✓

- Wave 1: Quick wins — archive, reporting DBs (weeks 1–6)
- Wave 2: Core analytics workloads — high ROI (weeks 7–14)
- Wave 3: Business-critical — with parallel run (weeks 15–24)
- Wave 4: Complex integrations — carefully scoped (weeks 25–34)
- Wave 5: Legacy decommission — celebrate (weeks 35–42)

📌 **Wave migrations deliver:** First business value in 6–8 weeks (Wave 1 completion). Each wave builds confidence, organizational trust, and team capability. Regulated environments add review gates that extend each wave.

CHAPTER 5

Risk & Change Management

Technical migration is the easy part. People, process, and governance are where migrations succeed or fail.



Migration Risk Matrix

Identify, rate, and own each risk before it becomes an incident. Every risk needs a named owner and a review date.

Risk	Likelihood	Impact	Mitigation
Data loss during cut-over	Low	Critical	Validated backup + point-in-time restore tested in pilot
Integration breakage	High	High	Full dependency map before Wave 1; parallel run 30 days
Performance regression	Medium	High	Benchmark in pilot, establish SLA baselines before migration
Scope creep	High	Medium	Change control board, documented scope, weekly steering
Key-person dependency	Medium	High	Knowledge transfer sessions, runbooks for every process
Cloud platform outage	Low	High	Multi-region DR design, fallback to on-prem for critical loads
Cloud cost surprise	Medium	Medium	FinOps from day 1, cost alerts, reserved capacity (industry avg: 28% cloud waste, Flexera 2024)
Data quality failure at unification	High	High	Data quality assessment in Wave 1, cleansing pipeline before migration

Business Continuity Planning

The new platform must coexist with the old one – plan for the parallel run period carefully

1 Dual-Run Strategy


Run old and new simultaneously for 2–4 weeks. Compare outputs at row level. Business users validate their own key reports before cut-over. Define formal acceptance criteria before the run begins.

2 Rollback Readiness

Old platform stays live until cut-over is formally signed off. DNS/connection string switch as the cut-over mechanism. Test the rollback in staging before you need it in production.

3 Cut-Over Window

Schedule during lowest-traffic period. Define go/no-go criteria 48 hours before. War room: all hands for first 24 hours post cut-over. Have a clear escalation path for every scenario.

 **Never negotiate away the parallel run.** If the business says "we can't afford two weeks of dual-run," they can't afford a failed cut-over either.

Change Management

Technology migrations are people projects – the OCM plan is as important as the technical plan



Executive Sponsorship

Identify a C-level sponsor with skin in the game – not a champion, but a sponsor who attends steering, signs off budget, and resolves blockers.



Champions Network

1–2 power users per department. Train them first. Give them early access and visible wins. Your force multiplier: 5 champions reach 50 users more effectively than 5 training sessions.



Communication Cadence

Weekly status email, monthly steering review, bi-weekly all-hands. No surprises. Silence breeds rumor – over-communicate consistently.



Role-Based Training

Separate tracks for report writers, data engineers, BI developers, and end users. Certify the champions first to create peer trainers.



30-60-90 Day Adoption

Day 30: functional. Day 60: old workarounds eliminated. Day 90: advocates, not just users.

Governance During Migration

Compliance cannot pause for migration – governance controls must be continuous across both platforms

Access Control

Mirror RBAC from old to new on day one. Use migration as an opportunity for a full access review – you won't get a better natural trigger.

Audit Logging

Enable audit on the new platform before any data arrives. Regulators count from the first record – not your go-live date.

Data Classification

Re-classify data as it migrates. PII, PHI, and PCI designations travel with the data – they do not reset at the new platform boundary.

Lineage & Change Control

Document lineage at every transformation point. Every schema change in both systems requires a record. The dual-platform period carries the highest change risk in the entire project.

📌 **Governance is not a phase – it's a continuous control.** The migration window is when audit scrutiny is highest.

Data Security & Compliance Methodology

Security is not a gate at the end – it's embedded in every phase of the migration

Phase	Security Activities
Assess	Data classification inventory, PII/PHI/PCI mapping, encryption-at-rest audit, access control baseline
Design	Target security architecture, encryption in transit, key management, compliance mapping (HIPAA/SOX/FINRA/PCI)
Pilot	Security validation on pilot workload, penetration test on new platform, DR test with documented results
Migrate	Per-wave security checklist, data masking for non-prod environments, audit log verification at each wave
Optimize	Ongoing vulnerability assessment, access review cadence, compliance automation and continuous monitoring

📄 **For regulated industries:** Engage your compliance team in Design, not Migrate. Engage your auditor at Wave 3, not at the end. The financial services case study demonstrates both of these principles.

CHAPTER 6

Case Studies

Three industries, three challenges, three migration paths — and the outcomes that followed. All case studies are composites based on multiple client engagements using Microsoft Fabric as the target platform.



Healthcare: Fragmented to Federated

Regional health system · 12 hospitals · 14 separate SQL Server instances · No unified patient view

Before

- 14 disconnected SQL instances — no unified data layer
- No cross-hospital patient matching capability
- Compliance reports: 3-week manual effort per audit
- No real-time bed or capacity visibility across sites
- 2 full-time DBAs per hospital — 24 FTE total

After — 16 Months

- Unified patient 360 across all 12 sites
- HIPAA audit: 2-hour automated report generation
- Real-time capacity dashboard across all hospitals
- 24 DBAs → 6 dedicated roles; 12 redeployed to analytics, 6 transitioned (no involuntary layoffs)
- **\$1.2M annual cost reduction** (~30% savings — consolidation project profile)

📄 **What was hard:** Patient matching across 12 different identity schemes took 3 months longer than planned. Legacy identity formats required a dedicated reconciliation sprint before unification could proceed. Budget for what you can't see yet.

Manufacturing: Silos to Single Source of Truth

Mid-size industrial OEM · 4 plants · SQL Server 2012 · The client story from Chapter 1 – revisited in full

Before

- 3-day data lag – operations flying blind daily
- ERP, CRM, MES, Finance completely disconnected
- \$1.8M/year all-in platform costs
- 14-hour nightly refresh window blocking operations
- 2 senior engineers quit – cited technical debt

After —9 Months

- Near-real-time visibility – 15-minute maximum data latency
- Unified lakehouse across all four plants on Fabric
- \$680K/year – **62% cost reduction**
- 14-hour nightly batch window eliminated entirely
- Engineers re-engaged – now building new features

📌 **Critical Decision:** MES (manufacturing execution system) was migrated last – it had undocumented real-time writes that only surfaced during structured assessment. A big-bang approach would have caused a plant-floor outage.

Financial Services: On-Prem to Compliant Cloud

Regional bank · \$8B AUM · SQL Server 2014 on-premises · SOX + FINRA compliance constraints throughout

Before

- SOX audit preparation: 6-week manual effort per cycle
- No real-time risk or liquidity dashboard
- DR: 4-hour RTO, 24-hour RPO — unacceptable for a regulated bank
- \$2.1M annual infrastructure cost
- Regulatory reporting lag: 2 full business days

After — 22 Months

- SOX audit evidence prep: 6 weeks manual → 4 hours automated
- Real-time risk + liquidity dashboard operational
- DR: 15-minute RTO, 15-minute RPO — bank-grade resilience
- \$890K/year — **58% infrastructure cost reduction**
- Regulatory T+0 reporting achieved

📌 **Key Lesson:** Bringing in a third-party audit firm at Wave 3 — not the end — removed the compliance blocker before it became a project-stopping delay. Added 3 weeks, prevented a potential 3-month halt. For SOX/FINRA, add 30–40% to your timeline estimate.

When Migrations Go Wrong

Industry data and our own lessons – because survivorship bias is real

38%

Exceed Timeline

Of large cloud migrations exceed their timeline by more than 50% (*McKinsey Digital, 2023*)

→ The MES Discovery
(Manufacturing)

Undocumented real-time writes from the MES. Structured assessment caught it. A big-bang approach would have caused a plant-floor outage. *Lesson: structured assessment isn't optional.*

28%

Cloud Spend Wasted

Of cloud spend wasted on average due to poor post-migration cost governance (*Flexera, 2024*)

→ The Wave 3 Audit Surprise
(Financial)

Two compliance gaps discovered at Wave 3. Added 3 weeks, saved 3 months. *Lesson: bring your auditor in early, not at the end.*

#1

Failure Mode

The most common failure is organizational – loss of executive sponsorship, scope creep, and change resistance

→ The Patient Matching Wall
(Healthcare)

Reconciling 12 identity schemes took 3 months longer than planned. *Lesson: budget 20–30% more time for data quality remediation in any consolidation project.*

CHAPTER 7

Building the Business Case

Executives approve migrations that are framed as business investments – not technology projects

- 📄 **Frame it right:** "We need to migrate to reduce costs and enable real-time analytics" gets funded. "We need to upgrade our database platform" does not.




Total Cost of Ownership

TCO calculation must be complete – partial models produce arguments, not decisions

Cost Category	Current State (Legacy)	Target State (Cloud)
Platform Licenses	\$180–400K/yr	\$120–280K/yr
Hardware / Hosting	\$60–140K/yr	\$40–90K/yr (managed)
DBA / Ops Labor	\$280–560K/yr (2–4 FTE)	\$140–280K/yr (1–2 FTE)
Storage Growth	\$40–80K/yr (20%/yr)	\$15–35K/yr (elastic)
Downtime Risk	\$100–500K/yr (1–3 events)	\$10–30K/yr (SLA-backed)
Integration Maintenance	\$60–150K/yr	\$20–40K/yr (managed)
Total Range	\$780K–\$1.97M/yr	\$285K–\$615K/yr

Platform migration TCO reductions of 55–65% are typical in our engagements. Manufacturing achieved 62% (\$1.8M→\$680K); financial achieved 58% (\$2.1M→\$890K).

 **Important:** The DBA/Ops labor line assumes staff reduction or redeployment. If your organization retains all staff, adjust this line to reflect redeployment as a productivity gain rather than cost elimination. The TCO Calculator in session materials includes a headcount toggle for this assumption.

ROI Components

Three categories of return – only the first is easy to measure. Build in two passes when presenting to finance.

Direct Savings

- License cost reduction: \$120–260K/yr
- Infrastructure reduction: \$80–190K/yr
- DBA & ops labor saving: \$140–280K/yr
- Downtime cost avoidance: \$90–470K/yr

Productivity Gains

- Data engineer productivity: \$80–160K/yr
- Analyst time-to-insight: \$60–120K/yr
- Self-service analytics uplift: \$40–90K/yr
- Compliance automation: \$100–400K/yr

Revenue Enablement

- Faster product decisions: directional, org-specific
- Real-time customer analytics: directional, org-specific
- New data products/services: directional, org-specific

📌 **Best practice:** Build in two passes. Pass 1 = direct savings only. Pass 2 = add productivity. Submit with productivity included, defend with direct savings if challenged by finance.

The Migration Investment

Understand what the migration itself costs – then frame it against the 3-year TCO delta

Category	Range
Assessment & Design	\$40–80K
Platform Licenses (Yr 1)	\$60–140K
Migration Labor	\$120–280K
Training & Change Mgmt	\$30–60K
Dual-Run Period	\$20–45K
Contingency (15%)	\$40–92K
Total Investment	\$310K–\$697K

Payback Analysis

6–18

Months to Payback

3–6×

3-Year ROI Range

Frame for the CFO: "A \$490K investment delivers \$1.12M in savings in year 1. We break even in approximately 6 months and achieve a 5.9× return over three years."

Remember That Client?

The manufacturing firm from Chapter 1 – here is what the business case looked like

62%

Cost Reduction

\$1.8M → \$680K annual platform costs

15 min

Data Latency

Down from a 3-day lag to near real-time operations

9 mo

Migration Timeline

Using the 5-phase structured framework

~6 mo

Payback Period

\$490K investment / \$93K monthly savings

5.9×

3-Year ROI

$(\$1.12M \times 3 - \$490K) / \$490K$

"We are spending \$1.8M/year on a platform that is 12 years old and losing us competitive ground daily. A \$490K migration investment will reduce annual costs to \$680K – saving \$1.12M per year. We break even in approximately 6 months and achieve a 5.9× return over three years."

📄 **One page, four numbers, one paragraph.** That's the business case that gets signed.



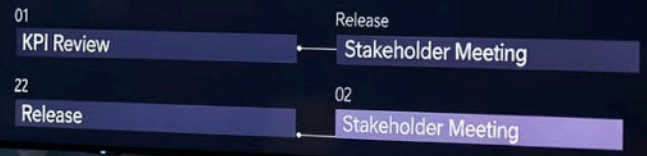
Phase 1: Launch

Enterprise Road Map



Roadmap

● Release ● Makelecode Centering



CHAPTER 8

Your 90-Day Roadmap

You leave today with a concrete first 90 days – not a vague intention to "look into migration"

Your 90-Day Roadmap

Days 1–30: Assess & Score

- Run your assessment using the 47-question scorecard
- Score your platform across all four dimensions
- Identify your pilot candidate workload
- Map dependencies on your top 3 critical databases

Days 31–60: Build the Case

- Build the business case with the TCO model
- Identify and approach your executive sponsor
- Evaluate and select your target platform using the decision matrix
- Calculate your savings estimate in the TCO Calculator

Days 61–90: Launch

- Launch the pilot workload with defined success criteria
- Establish your champions network (1–2 per department)
- Define formal go/no-go criteria for Wave 1
- Celebrate your first visible win

The 90-day plan doesn't complete the migration — it starts it with credibility, a champion, a business case, and a visible early win.

Your Action Plan for Monday

Four concrete actions – no budget, no approval, no committee required to start

1 Score Your Platform

Use the assessment scorecard in today's materials. Four dimensions, 20 points max. Takes 45 minutes. Share the result with your manager this week.

2 Map Your Dependencies

Pick your three most critical databases. List every application, script, and report that connects to them. You'll be surprised what you find – and that's exactly the point.

3 Calculate Your TCO

Open the TCO Calculator from the session materials. Fill in your six cost categories. See your annual savings estimate in 30 minutes – before your next stakeholder meeting.

4 Identify Your Sponsor

Who in your organization has the authority and motivation to champion a migration? Identify that person and start the conversation this week – not next quarter.

Templates You Leave With

Five practical tools – designed to be used this week, not filed and forgotten



Platform Assessment Scorecard

47 questions across 4 dimensions. Score 1–5 per criterion. Output: urgency rating + readiness gate.



Pilot Selection Worksheet

8 criteria, weighted scoring model. Rank your top 5 workload candidates objectively.



Stakeholder Map Template

Champion/blocker identification, influence scoring, engagement strategy per person.



TCO Calculator (Excel)

Current vs. target state side by side. Input your numbers – get payback period, 3-year ROI. Includes headcount toggle.



Migration Risk Assessment

Pre-populated with 10 common risks. Rate likelihood/impact, assign owners, set review triggers.



Access: Email jonathan.stewart@soundbi.com with "Migration Templates" in the subject line. Templates are versioned (v3) – if you received an earlier version, request the update.

Key Takeaways

If you remember nothing else from today, remember these five



Staying Put Is Not Neutral

Every year of delay compounds your technical debt, talent risk, and competitive gap. Inaction has a real, measurable cost.



Assessment Is Not Optional

2–3 weeks of structured assessment surfaces hidden complexity before it becomes a production incident. Every hour in assessment saves 10 hours in migration.



Platform Choice Is About Fit

Score objectively using weighted criteria. The best platform fits 80% of your workload and your team's existing skills — not the industry hype cycle.



Wave Migration Wins

Big-bang migrations fail. Wave migration delivers first business value in 6–8 weeks and builds organizational confidence wave by wave.



Frame as Business Investment

Technical migrations get delayed. Business investments with TCO models, ROI projections, and clear payback periods get funded.

What's your first step? Score your platform this week.

Ready to Start?

Three engagement paths depending on where you are in your migration journey

Path 1 —Self-Guided (Free)

- Use the templates from today's session
- Score your platform, build your TCO model, identify your pilot
- Email me with questions: jonathan.stewart@soundbi.com

Path 2 —Guided Assessment (2–3 Weeks)

- Sound BI runs the structured assessment with your team
- Deliverables: complete scorecard, dependency map, pilot recommendation, business case draft
- Typical investment: \$40–80K depending on number of source systems

Path 3 —Full Migration Program

- Assessment through Wave 1 delivery — typically 4–6 months for first production workload
- Includes platform selection, architecture design, pilot execution, and change management
- Timeline and investment scoped after assessment — we don't quote without completing Path 2 first

📄 **Next step for any path:** Email jonathan.stewart@soundbi.com with "Next Steps" in the subject — I'll respond within 24 hours.

Sources & References

Industry Data

- **Annual cost inflation (8–12%):** Gartner *IT Key Metrics Data (2023/2024)*, IDC *Worldwide IT Spending Guide*
- **Migration failure rates:** McKinsey Digital (2023), "Cloud migration: Five common pitfalls" – 38% of large migrations exceed timeline by >50%
- **Cloud cost waste (28%):** Flexera *State of the Cloud Report (2024)*

Sound BI Engagement Data

- TCO ranges & savings: N=12 platform migration projects, 2019–2025
- Break-fix time (~50%): N=20+ assessments, enterprise SQL Server environments
- Shadow integration discovery (20–40%): N=20+ assessments
- "20% not ready" advisory rate: N=20+ assessments
- Case study composites: multiple engagements per industry – figures are representative

Methodology Notes

- Assessment framework: 47-question proprietary instrument across 4 dimensions. Not externally validated. Scoring threshold (14/20) based on practitioner experience.
- TCO model: 6-category full-stack comparison. DBA labor line is the largest variable.
- SOX reduction in financial case refers to audit evidence preparation time, not the full audit cycle.

Disclosure

Sound BI is a consulting firm specializing in Microsoft Fabric migrations. This presentation draws on our client engagements. The frameworks are platform-agnostic; the case studies and deep expertise reflect our Fabric practice.



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Thank You

Start with the scorecard. Score your platform this week.

