

Practical guide: **MIGRATING TO dbt**

INTRODUCTION

Why migrate to dbt?

Modern data teams require flexible, scalable, and cost-efficient tools to manage **data transformations**.

Many organizations are shifting to **dbt** (Data Build Tool) to leverage its open-source flexibility, strong community support, and seamless integration with modern cloud data warehouses.

This guide outlines:

- Key drivers for migration
- Comparison of previous gen. tools and dbt
- Step-by-step migration process
- dbt best practices
- Real-world case studies.

KEY DIFFERENCES

FEATURE	PREV. GEN. GUI TOOLS	dbt
Execution Scaling	Limited scalability. Static execution queues.	Unlimited on dbt side. Dynamic DAG.
Collaboration	Proprietary concepts trying to imitate Software Development best practices.	Embrace Software Development established best practices. Full Git support. Supports dbt mesh & multiple teams.
Licensing & cost	Proprietary software, high cost.	Open-source, lower TCO.
Developer experience	Requires proprietary UI knowledge.	SQL-based, easier onboarding.
Integrations	Limited integrations.	Integrates with modern data stacks.

Conclusion

- dbt offers a more developer-friendly, cost-effective, and scalable approach for managing data transformations
- In-depth feature comparison with gap analysis is available upon request.

MIGRATION PROCESS: STEP-BY-STEP

1.

Define objectives and KPIs

- Identify key drivers for migration
- Define KPIs to measure migration success.

2.

Choose the right migration approach

- Technical lift & shift: moving existing logic directly to dbt with minimal changes, or
- Rebuilding data models: redesigning the data model to fit dbt best practices.

3.

Understand key technical differences

- dbt does not handle scheduling; use external orchestrators like Airflow, Dagster, or dbt Cloud
- Ensure data pipelines feeding old systems are compatible with dbt's transformation process
- Adjust permissions and access control for dbt workflows.

4.

Use migration tools & automation

- SQL conversion scripts to translate old logic to dbt models
- Automated testing to validate transformed data
- Leverage AI and LLMs for accelerating migration.

5.

Establish new ways of working

- Upskill teams on dbt best practices
- Use dbt's built-in documentation and Git for collaboration
- CI/CD & testing: Implement automated data testing and deployment workflows.

SUCCESS STORY

Creating scalable and robust ways of working for a large energy company

Adopting new technologies and workflows is never easy. With countless options available, prioritizing implementation can feel overwhelming.

Our expert Data Architects led development, going beyond daily tasks to establish scalable workflows and improve team communication.

- 4000+ entities managed in ADE in Data Vault
- 7000+ entities managed in dbt
- 30+ active developers



SOURCE SYSTEMS:

30+, including e.g. SAP and Anaplan

TECHNOLOGIES:

Azure, Snowflake, data build tool (dbt), Agile Data Engine (ADE), Data Vault 2.0

TYPE OF SOLUTION:

Leading development and development teams.

SUCCESS STORY: WALKI

BOOST EFFICIENCY & DECISION-MAKING WITH UNIFIED DATA PLATFORM

THE CHALLENGE

- Reporting system was decentralized and it was difficult to generate reliable insights across the organization
- Lack of standardized, transparent reporting across the organization.

OUR SOLUTION

- Redesign entire data platform architecture, incl. renewed data warehousing and reporting systems
- Walki can now:
 - Build high-quality data products faster with automated data modeling and testing
 - Ensure full data traceability
 - Grasp key insights right away.

IN THE WORDS OF THE CUSTOMER

“The solution provides us with transparent data pipelines, faster and more reliable deployment, and reduced costs. With the new solution, we can easily view and analyze data processes both in detail and as a whole. Anyone can now easily understand the process without the need to dig through piles of separate documentation.”

Henrik Ahnger, ICT Manager Business Intelligence and Reporting, Walki Group



Photo by Walki

ABOUT THE CUSTOMER

Walki specializes in the manufacturing of technical laminates and protective packaging materials through environmentally friendly solutions

SOURCE SYSTEMS:

ERP, Production planning and operation systems, legacy ERP

TECHNOLOGIES:

Fabric, dbt

TYPE OF SOLUTION:

Re-designing former provider's data platform

KEY RESULTS

- Faster, clearer insights
- Reliable and transparent data pipelines
- Scalable reporting framework
- Reduced onboarding time.

NEXT STEPS

Ready to migrate to dbt?

We can help you:

- Assess your current setup
- Plan a seamless migration strategy
- Train your data teams on dbt best practices.

Contact us today to get started with your migration!



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RECORDLY