

Implementation and Data Migration Guidelines



Overview

Many of our customers have moved from a wide variety of systems and one of the most common queries is how easy is it to migrate data from their existing database, over to Intelligent Office. Since inception, IntelliFlo have migrated hundreds of customers' data and therefore feel confident we can make this sometimes daunting process, as seamless as possible.

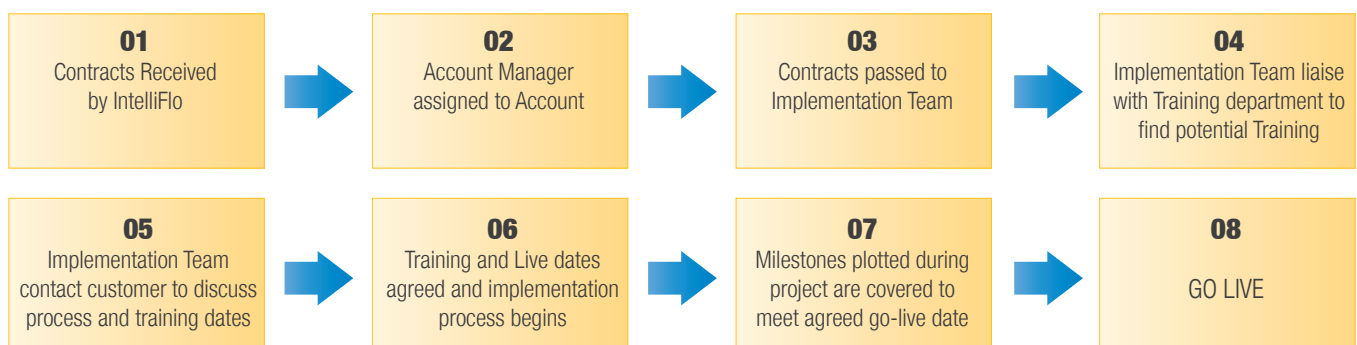
Simply put, the implementation and data migration process is split into several action points from the initial receipt of a customer's contract, through to the customer going live with Intelligent Office.

Sample Implementation Process

The implementation and data migration process is an intricate and time consuming process which requires input not only from IntelliFlo but importantly, from the customer.

IntelliFlo works closely with customers to ensure the transition is as smooth as possible. By keeping the communication at an optimum at all stages, we firmly believe we can offer a seamless service. The implementation not only includes set up and data migration, but also "Getting Started" training, branding of the customer's account and assignment of an Account Manager.

The High Level Processes



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Sample Implementation Timeline

Below is an example timeline of how the stage fit in between receipt of contracts and the agreed go-live date. Every customer is assigned an experienced Account Manager who is at hand, moving forward, to aid and assist each customer and any queries they might have. We also tailor the implementation timescales where relevant to suit each customer.

The timeline below represents a typical 6-8 week implementation.

	1st Jan	2nd – 15th Jan	20th Feb	1st March	3rd-7th Mar
Signed contract received by IntelliFlo	█				
Assigned Account Manager	█				
Implementation Team to call account and discuss implementation process and agree milestones		█			
Data migration tasks (if applicable) Extract approximately 2 weeks prior to going live			█		
Client live with Intelligent Office				█	
Getting Started training				█	
Account Manager introduction call				█	
Account Manager Configuration Overview					█

NB We can offer to migrate data after the go live if required. However, the data migration process itself can be split into seven convenient steps.



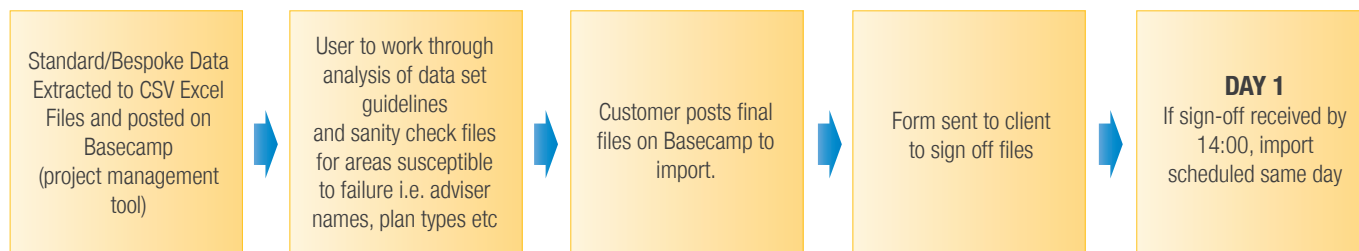
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Sample Data Migration process

Once the data migration service has been decided on and the contract signed, the data migration process takes the following path as per the flow diagram below:



To add a little more detail to the diagram, we can break down the migration steps into three key areas:

Step One

The customer sends a copy of the database (via an encrypted web server) and we will create a set of extract CSV files from the database which can be viewed using Excel. For a Standard Clients and Plans migration we will send you up to three files (Clients, Plans and Schemes - where applicable). In these extracts we will provide general cleansing of plan type and provider name data (typically cleaning 90%+ of these records ourselves). We also send the customer a Summary Report of your data detailing what the quality of your data is and what data you will need to update or format differently. Normally this is returned via email within two days of receiving the database.

Step Two

This is an important step, as it gives the customer the opportunity to do what they have probably not been able to do before - cleanse the data.

Upon receipt of the extracts from us along with the Summary Report, customers will find that within Excel it is relatively easy to update multiple records in one go. The amount of time this will take you will depend largely on the knowledge of the clients and plans, volume of data and the quality of the original. On average, most customers reserve two days for this process, but this does depend on the quality of the data and how it matches to Intelligent Office. Once completely happy with the data, it will be returned to us via email.

Step Three

Upon receipt of the data, we then import into Intelligent Office. For a standard client and plan migration, this normally would take up to three days. We provide a final report of success metrics which highlights any records that did not migrate. Typically, success rates range between 85% and 99% with an average rate of 95%. We would also recommend conducting a series of optional Test Runs (see below) to improve the success rate of the import.

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Test Iterations

Some customers find their data is not of the greatest quality and whilst implementing a new solution, find it a great time to optimise the quality of their data. Essentially, this contains Steps 1 - 3 above, but we only import the data into our test system. The final report then will then provide the opportunity to cleanse the source database, or ensure that the customer can update the final set of spreadsheets in the best manner possible. Optional Test Iterations are available from £500 per run.

Data Migration: Standard vs Bespoke

There are a number of Back Office Systems (BOS) we can migrate data from for a standard charge. A common misconception is although data may come from one of the listed BOS, the file format is not always the file we use and consider to be "standard".

What's included in our 'Standard' Service

This service ensures that a set of standard data is transferred from your existing system at a fixed price. The software packages that are included within our standard provider list are:

1st Software	Durell	Quay Software	Synaptic Client Manager
Plum Software	Bankhall Online	Bluecoat	Prestwood
Fairs	Finale Consultant	Sesame Office	Personal Touch Toolbox
Swift	Intelligent Office (internal transfers)	JCS	CCL (Simplicity)

The range of fields that are included within the standard migration are as follows **:

Contact Type	First Name	Middle Name
Last Name	Corporate Name	NI Number
Title	Date of Birth	Address
Postcode	Gender	Fax
Telephone	Mobile	Email
Smoker	Servicing Adviser	Client Service Status
Website	Relationship Type	Related Client
Notes	Work Phone	Secondary Mig Reference
Deceased Date	Salutation	

** Where the data exists within current database

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Plans and Expected Commission Fields **:

Plan Type	Draft Date	Product Name
Advice Type	NTU Date	Plan Status
Policy Number	Provider	Submitted Date
Total Expected Commission Entry	In Force Date	Notes
Owners (Primary and Secondary)	End Date	

** Where the data exists within current database

A single charge is borne for this service with prices starting from £500+VAT*

*Prices listed are introductory and apply to new customers signing up to Intelligent Office. All other data migration requests will be given a price on application.

The following is a list of files, relevant to each BOS, that we would need site of in order to migrate to Intelligent Office:

BOS	Standard files used	Non standard files - Bespoke
1st	Main1st.mdb or Main1st.bak (if using SQL database backup)	CSV export, Excel export, Text export, etc.
CCL / Simplicity	simplicity.mdb	CSV export, Excel export, Text export, etc.
Durrell	imw-data.mdb	CSV export, Excel export, Text export, etc.
Prestwood	prestwood.mdb	CSV export, Excel export, Text export, etc.
Quay	Clients.* Log.* Premcomm.* Commrec.* Work.* (if migrating tasks) There are other files required but only if importing data outside of our Standard Clients and Plans	CSV export, Excel export, Text export, etc.
JCS	JCSwi.mdb JCSAdmin.mdb	CSV export, Excel export, Text export, etc.
Plum	FF_Data97.mdb or FF_Data97.bak (if using SQL database backup)	CSV export, Excel export, Text export, etc.
Sesame Office	mi-Data2.mdb	CSV export, Excel export, Text export, etc.
Swift	swift.mdb	CSV export, Excel export, Text export, etc.



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Additional Data Items (optional)

Commonly, many customers may decide they require extra data to be extracted from the source back office into Intelligent Office. We may have already carried out such a migration, in which case will have an “off the shelf” service you can purchase at a much lower cost than a bespoke migration.

Enhanced Service

Our Data Migration experts have been involved in data transfers for very large financial organisations from a variety of different database platforms. We work with our customers to identify their complete data needs, sources and cleansing requirements to capture all of the required data. A formal requirements capture, design, implementation and test approach is utilised to ensure we provide the very best of services. Project timescales vary depending upon complexity but typically range from 5 days to 60 days

Details	Additional Pricing From	Availability
Standard Clients and Plans	£500+VAT	1st, Bankhall Online, Bluecoat, CCL, Durrell, Fairs, Finale Consultant, JCS, Quay, Personal Touch Toolbox, Plum, Prestwood, Sesame Office, Swift, Synaptic Client Manager and including internal Intelligent Office transfers.
Plans Enhanced – Protection, Pensions, and Mortgage Extra Data	POA	1st, Quay, Swift
Current Regular and Single Premiums	£100 + VAT	1st, Quay, JCS, Plum, Sesame Office, Swift
Fund Holdings held within policies	POA	1st, JCS
Tasks and Activities	POA	1st, Swift, Plum, Quay
Premiums, Contributions and Withdrawals full history	POA	1st, JCS, Quay, Swift
Expected Commission History	POA	1st, Quay
Protection, Pensions and Mortgage Extra Data	POA	1st, Quay
Introducers and Splits	POA	1st, Quay
Advisers	POA	1st, Bluecoat

If you have any queries relating to Implementation and Data Migration, do call us on **0845 230 3700** or email us at: sales@intelliflo.com where one of our executive would be pleased to help you further.



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