

Data migration

Implementation and data migration guidelines



Overview

Many Intelligent Office users 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 (iO)?

Since inception, Intelliflo has migrated thousands of customers' data and are confident in making this process as seamless as possible.

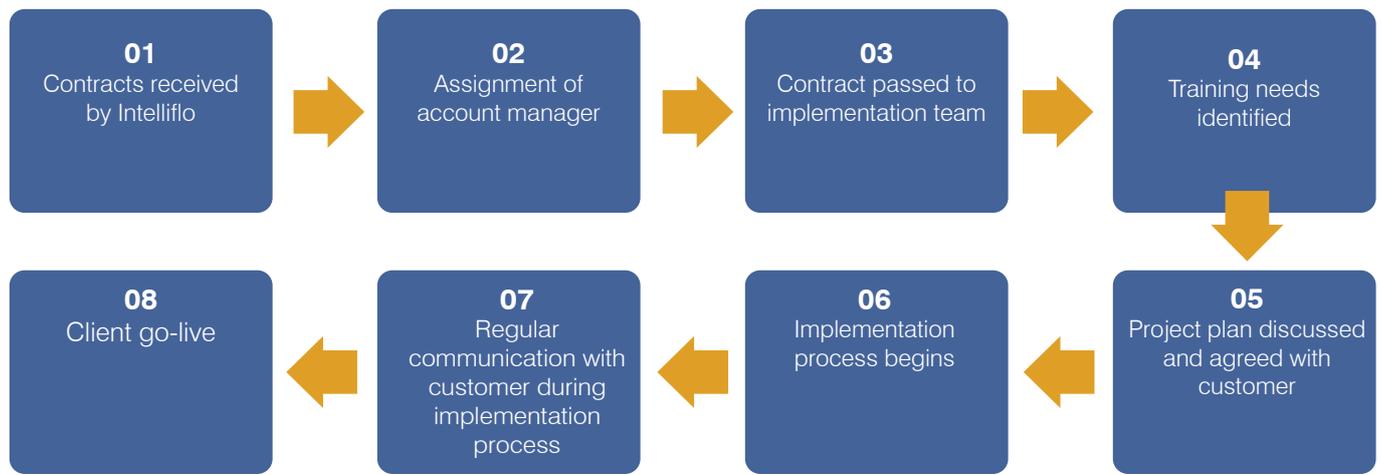
To facilitate the transition over to Intelligent Office, the implementation and data migration process is split into several action points, from the initial receipt of a customer's contract, through to the client going live with Intelligent Office.

Sample implementation process

The implementation and data migration process requires input not only from Intelliflo but most importantly, from the customer. Intelliflo works closely with customers to ensure the transition is as smooth as possible. By having regular communication at all stages, Intelliflo firmly believes it can offer a seamless service.

The implementation not only includes set up and data migration, but also introductory training to Intelligent Office, branding of the customer's account and assignment of an account manager.

Overview of the implementation process



Sample implementation timeline

Below is an example timeline from receipt of contracts to the agreed go-live date. However, Intelliflo can also tailor the implementation timescales where necessary.

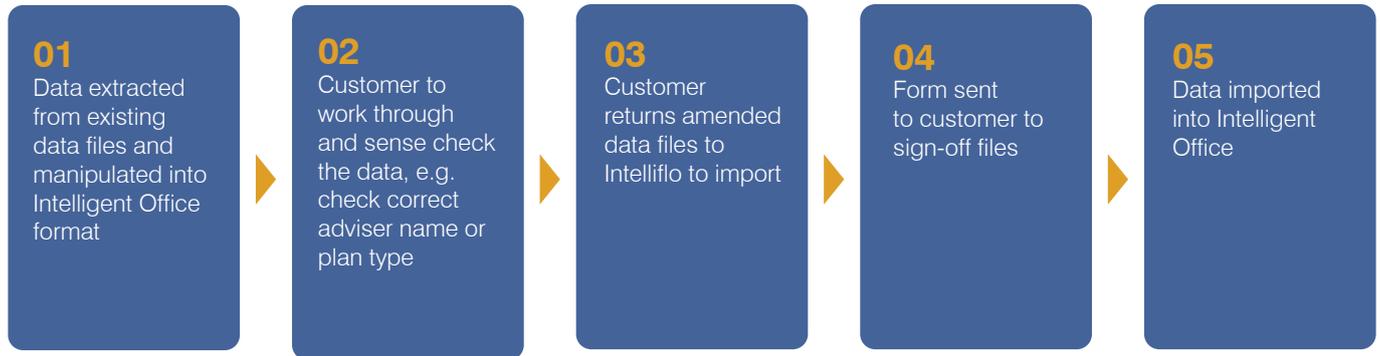
The timeline below represents a typical 6-8 week implementation.

	1 Jan	2 – 15 Jan	20 Feb	1 Mar	3 - 7 Mar
Signed contract received by Intelliflo	█				
Assigned account manager	█				
Implementation team contact customer to discuss implementation process and agree milestones		█			
If applicable, customer data is extracted approximately two weeks prior to going live			█		
Customer go-live with Intelligent Office				█	
Customer attends introductory training				█	
Account manager introduction call				█	
Account manager configuration overview					█

NB Timescales are flexible and vary from case to case.

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:



Data migration can be broken down into three key areas:

Data extraction

The customer securely sends through a copy of their database. Upon receipt, Intelliflo creates a set of spreadsheets, typically one per service e.g. clients, plans, tasks etc. Average turnaround is two working days. A report will accompany the data extracts providing a thorough analysis of the quality of data along with guidance on how to further cleanse the data. Whilst Intelliflo will have already cleansed the data within a 90%+ threshold, there will still be some input required on behalf of the customer.

Data cleanse

Upon receipt of the data extracts and accompanying analysis, the client has the opportunity to further cleanse the data within Excel. The time required for the completion of this activity depends on multiple factors such as quantity and quality of data. On average this process should take around two working days.

Data import

With the data files cleansed and returned to Intelliflo, the files are signed off and the import process scheduled in. A typical migration of client and plan data takes up to three working days to complete. As a rule of thumb, allow one day per import file.

Average success rates for a data import exceed 95%. To improve on this further optional test extracts can be requested.

Test iterations

Some customer find their data is not of the greatest quality and when choosing to implement a new solution, find it a great time to improve it. Test iterations include an extract, analysis and cleanse of data in preparation for a final live extract. The final report provides 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 plus VAT per run.

Data migration: standard vs bespoke

Please note that although data may come from one of the listed back office systems, occasionally the file is not in a readable format to be considered 'standard'.

What's included in Intelliflo's 'standard' service

This service ensures that a set of standard data is transferred from your existing system at a fixed price. The back office systems that are included within Intelliflo's standard provider list are:

Bankhall Online	Fairs	JCS	Sesame Office
Bluecoat	Finale Consultant	Personal Touch Toolbox	Swift
CCL (Simplicity)	iO (internal transfers)	Plum software	Synaptic Client Manager
Durell	Iress (previously 1st/Avelo/ Adviser Office)	Quay Software	

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 migration reference
Deceased date	Salutation	

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

Prices start from £500+VAT*

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

The following is a list of files for both standard and bespoke migrations,, relevant to each back office system, that Intelliflo needs sight of in order to migrate to Intelligent Office:

Back office system	Standard files used	Non standard files - bespoke
CCL / Simplicity	simplicity.mdb	CSV export, Excel export, Text export, etc.
Durell	imw-data.mdb	CSV export, Excel export, Text export, etc.
Iress (previously 1st/Avelo/Adviser Office)	Main1st.mdb or Main1st.bak (if using SQL database backup)	CSV export, Excel export, Text export, etc.
JCS	JCSwi.mdb or 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.
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.
Sesame Office	mi-Data2.mdb	CSV export, Excel export, Text export, etc.
Swift	swift.mdb	CSV export, Excel export, Text export, etc.

Enhanced service

Intelliflo's data migration experts can also offer an enhanced service to customers. This service is ideal for those customers with large data sets coming from a variety of different databases with significant cleansing requirements. To ensure the very best service, a formal capture of design, implementation and testing is required before completion.

Project timescales vary depending upon complexity but typically range from five to 60 days.

Additional data items (optional)

Intelliflo is able to offer an additional data extract service. This service is perfect for those wishing to carry out our 'standard' service plus a few additional data items and is a much cheaper option than a bespoke service. The table below lists the additional services available.

Data field	Back office system
Standard clients and plans	Bankhall Online, Bluecoat, CCL, Durrell, Fairs, Finale Consultant, Iress (1st/Avelo/Adviser Office), JCS, Personal Touch Toolbox, Plum, Sesame Office, Quay, Swift, Synaptic Client Manager internal iO transfers.
Plans enhanced – protection, pensions, and mortgage	Bluecoat, Iress (1st/Avelo/Adviser Office), Plum, Quay, Swift
Current regular and single premiums	JCS, Iress (1st/Avelo/Adviser Office), Plum, Quay Sesame Office, Swift
Fund holdings held within policies	JCS, Iress (1st/Avelo/Adviser Office)
Tasks and activities	Durrell, Iress (1st/Avelo/Adviser Office), Plum, Quay, Swift
Premiums, contributions and withdrawals full history	JCS, Iress (1st/Avelo/Adviser Office), Quay, Swift
Expected commission history	Iress (1st/Avelo/Adviser Office), Quay

Learn more

If you have any queries relating to **data migration** call us on **0330 102 8402** or email us at sales@intelliflo.com where one of our executives would be pleased to help you further.

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