

# Four steps to data heaven

Data migration is a complex activity. **Philip Davies** provides four steps to getting it right

Data migration is a notoriously complex activity and usually causes those tasked with the responsibility to wince at and lament the many stories of projects gone awry.

Getting detailed information from an existing portfolio onto a new system requires a high level of technical skills and is bound to be tricky.

Firstly, the issue of timescale. It takes roughly six weeks for a small data set of 500 to 1,000 records to be transferred and a system containing 1,000 to 3,000 roughly three months. A very basic assumption would be to calculate six weeks for every 1,000 records – with a major project taking six to nine months.

Secondly, a decision to use data migration software can add another level of complexity. The technical skills to complete the project may be expensive and not readily available – especially for legacy systems.

Furthermore, there is sometimes a lack of cooperation on the part of existing system providers. All too often they view the situation as a final revenue-generating opportunity. Reputation matters little for some providers, who believe the client is lost anyway. If this scenario becomes an issue, a commercial decision needs to be made to evaluate the likely cost of using the software provider versus simply rekeying the data manually. For smaller datasets, the latter option using a temp or stu-

dent is very often the best route all round.

Thirdly, if you are currently agreeing either a new outsourcing or software contract for your portfolio or have an existing arrangement with a provider, it is important to plan the issue of an eventual exit carefully. Make sure the contract with your existing provider sets out a fair price mechanism for an exit. And if it doesn't yet, include one now to cover you for the future.

Finally, the other aspect to consider is how much of the existing data to migrate. Do you need all the case history to be added for every record? As with evaluating the cost of using specialist migration software, a commercial decision needs to be made regarding

either having the entire data set migrated or a partial migration, transferring just open balances and future financials, with read-only access to historical note information. This tends to be the choice of most clients who simply cannot justify the cost of a full migration.

Following these steps will certainly smooth the technical aspects of a migration, but this is by no means the end of the issue. Invariably the change to a new system means existing people have to follow new processes – including reporting requirements, invoicing, DD collections and HPI interfaces.

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