Implementation and data migration guidelines

Overview

Many of our clients 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 have migrated hundreds of clients' data and are confident we can make this process as seamless as possible.
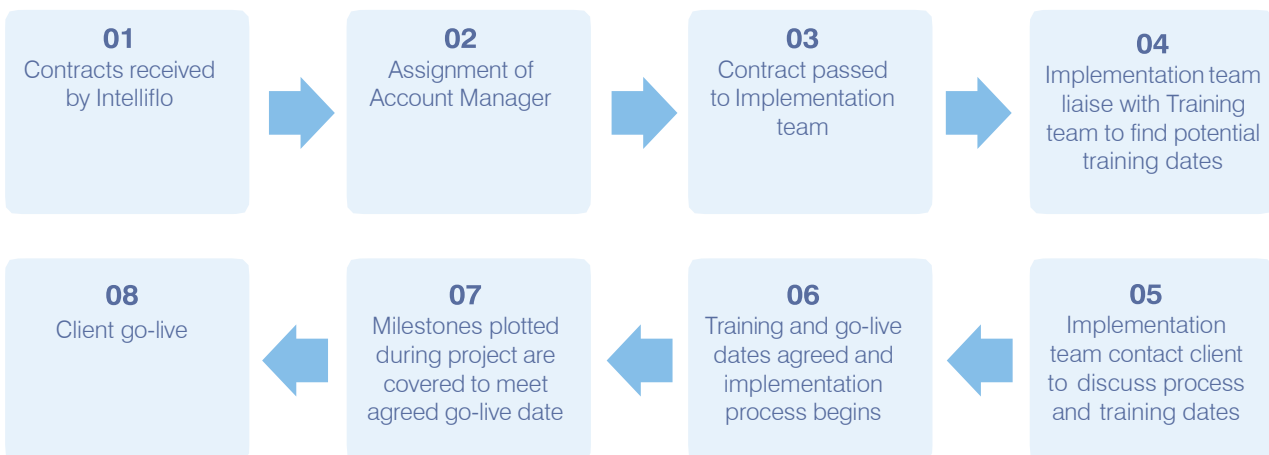
To facilitate the transition over to iO, the implementation and data migration process is split into several action points, from the initial receipt of a client's contract, through to the client going live with iO.

Sample implementation process

The implementation and data migration process is an intricate process which requires input not only from Intelliflo but importantly, from the client.

Intelliflo work closely with clients to ensure the transition is as smooth as possible. By having regular communication at all stages, we firmly believe we can offer a seamless service. The implementation not only includes set up and data migration, but also introductory training to iO, branding of the client's account and assignment of an Account Manager.

Overview of the implementation process

01 Contracts received by Intelliflo	02 Assignment of Account Manager	03 Contract passed to Implementation team	04 Implementation team liaise with Training team to find potential training dates

08 Client go-live	07 Milestones plotted during project are covered to meet agreed go-live date	06 Training and go-live dates agreed and implementation process begins	05 Implementation team contact client to discuss process and training dates

Sample implementation timeline

Below is an example timeline of how each stage fits in between receipt of contracts and the agreed go-live date. Every client is assigned an experienced Account Manager who is at hand to aid and assist with any queries they might have. We also tailor the implementation timescales where relevant to suit each client.
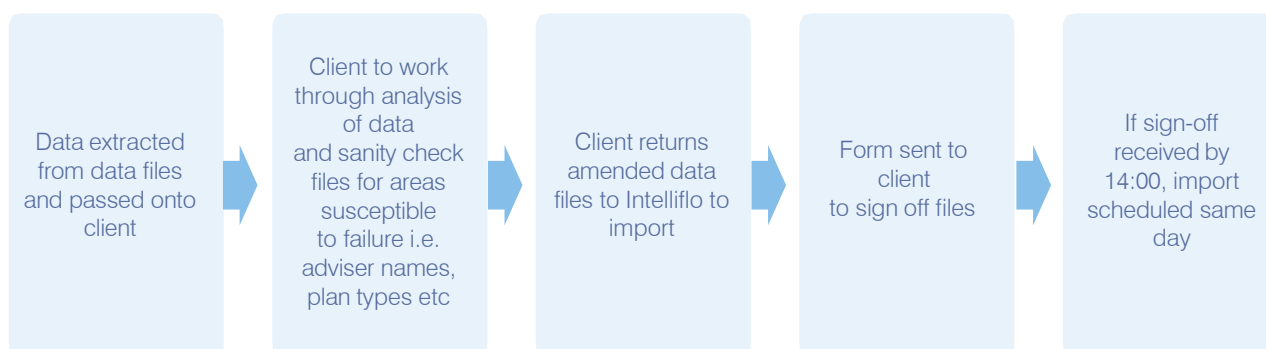
The timeline below represents a typical 6-8 week implementation.

	1 Jan	2 – 15 Jan	20 Feb	1 Mar	3 - 7 Mar
Signed contract received by Intelliflo	�				
Assigned Account Manager	▮				
Implementation team contact client to discuss implementation process and agree milestones		▮			
If applicable, client data is extracted approximately 2 weeks prior to going live			▮		
Client go-live with iO				▮	
Client 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 extracted from data files and passed onto client	→	Client to work through analysis of data and sanity check files for areas susceptible to failure i.e. adviser names, plan types etc	→	Client returns amended data files to Intelliflo to import	→	Form sent to client to sign off files	→	If sign-off received by 14:00, import scheduled same day

Data migration can be broken down into three key areas:

Data extraction

The client securely sends through a copy of their database. Upon receipt, Intelliflo creates a set of spreadsheets, typically one per service, for example 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 client.

Data cleanse

Upon receipt of the data extracts and accompanying analysis, the client has the opportunity to 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 clients 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 client 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

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 can 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 BOS that are included within our standard provider list are:

Bankhall Online	Fairs	Iress - XPLAN	Sesame Office
Bluecoat	Finale Consultant	JCS	Swift
CCL (Simplicity)	iO (internal transfers)	Plum software	Synaptic Client Manager
Durrell	Iress - Adviser Office (previously 1st/Avelo)	Quay Software	True Potential

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

Address	Gender	Saluation
Client service status	Last name	Secondary migration reference
Contact type	Middle name	Servicing adviser
Corporate name	Mobile	Smoker
Deceased date	NI number	Telephone
Date of birth	Notes	Title
Email	Postcode	Website
Fax	Related client	Work phone
First name	Relationship type	

** *Where the data exists within current database*

Plans and expected commission fields **:

Advice type	NTU date	Provider
Draft date	Owners (primary and secondary)	Product name
End date	Plan status	Submitted date
In force date	Plan type	Total expected commission entry
Notes	Policy number	

Prices start from £600+VAT*

*Prices listed are introductory and apply to new clients signing up to iO. 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 sight of in order to migrate to iO:

BOS	Standard files used	Non standard files - bespoke
CCL / Simplicity	simplicity.mdb	CSV export, Excel export, Text export, etc.
Durrell	imw-data.mdb	CSV export, Excel export, Text export, etc.
Iress - Adviser Office (previously 1st/Avelo)	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.
True Potential	True Potential can provide you with a standardised extract upon request. Note that True Potential may charge for this service.	
Sesame Office	mi-Data2.mdb	CSV export, Excel export, Text export, etc.
Swift	swift.mdb	CSV export, Excel export, Text export, etc.

Enhanced service

Our data migration experts have been involved in data transfers for very large financial organisations from a variety of different databases. We work with our clients to focus on identifying data, sources and cleansing requirements. To ensure we provide the very best of services, a formal capture of design, implementation and testing is completed.

Project timescales vary depending upon complexity but typically range from 5 days to 60 days.

Additional data items (optional)

Commonly, many clients may decide they require extra data to be extracted from the source back office into iO. 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. In addition to the standard client and plan extract service, we also have the service detailed below. Those BOS's which we have a service for are detailed in the adjacent column.

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