Achieving Data Integrity in Preparation for Data Migration Effort

BUSINESS CHALLENGE

A leading competitive carrier with customers throughout California and Nevada faced some serious migration challenges during its acquisition of a CLEC's small / medium enterprise (SME) customer base. Intent on maximizing its return on investment, the company wanted to ensure that complete and accurate data would be migrated for ongoing support and that potential customer churn during and after migration would be minimal. In this way, the carrier would be able to generate additional revenue opportunities over time with these new assets while maintaining the acquired baseline revenue stream.

Historically the carrier would build out all of an acquired company's products in its billing system, which used significant internal resources and incurred significant costs. Usually a good percentage of the acquired companies' products mirrored existing products, and redundancy and duplication of effort ensued.

It became questionable whether the carrier's typical IT-focused approach and one-off use of independent contractors to collect data, run it through scripts and place it on the system, was going to be sufficient for this project. Given the unique set of issues this migration presented, the carrier concluded that it needed help from an experienced migration company to ensure the data was going to be accurate and usable at the end of the process and customers would be fairly and consistently billed and retained.

The carrier turned to Vertek to help achieve its objectives for the migration of the acquired SME customer base.

A significant set of issues included:

· Duplicate products would create an unwieldy billing system
· No single view of the CLEC's newly acquired customers and billing inventory was available

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- The main system for storing customer data was a ticketing system of notes
- There was no direct path for migrating data from a back-end perspective

THE VERTEK SOLUTION

THE TRIAL

Vertek was engaged to conduct a six-week trial to scrub a sampling of customer data and systems, drawn from the total of 1900 acquired customers. The trial would serve as a test of Vertek's capabilities, since the two companies had not worked together in the past. If the trial was successful a six-month program to create an accurate database of all 1900 customers would follow.

At the outset, the Vertek team, bolstered by a strong telecommunications background, was soon convinced that the only way to create an accurate database would be to manually collect and corroborate the customer data. To validate their approach, the team chose to take a statistically relevant sample of 100 customers and set to work.

They quickly found:

- Data that appeared correct but in fact had gaping holes in the files, casting doubt on the accuracy of all data
- Systems that were 98% accurate, but had only 20% of the necessary data
- Systems holding considerable data on every customer were only 40% accurate
- Over 16 different systems held customer data, up from the original five they had anticipated working on to cross-check data

The team persevered, and as they predicted, much of the trial had to be conducted manually. At the completion of the trial they had compiled accurate information for all 100 customers.

A second component to the trial involved minimizing the number of new products required for inclusion in the product catalog. Working jointly with the carrier, Vertek created a process whereby standard products were easily mapped while dissimilar products were built into the existing platform.

THE PROGRAM ROLLOUT

Having proven the validity of its approach and gained the confidence of the client, Vertek was asked to complete the six-month project with them. The project had three phases:

- **PHASE ONE** consisted of collecting and validating data and customer inventory and billing, completing QA processes and loading data on the 1800 remaining customers into a staging database.

- **PHASE TWO** included pro forma analysis once all the data was in the database and pushed to a staging environment – more than 750 pro forma invoices were reviewed and validated over 10 different bill runs.

- **PHASE THREE** was a customer bill review and inconsistencies were flagged and handled proactively by Vertek and the carrier, reducing the "surprise factor" when those customers received their new bills.

NET RESULT

During the 7 ½ months that the trial and rollout took place:

- 1,900 customer accounts were evaluated, corrected as needed and migrated
- 2,200 circuits were reviewed
- 6,300 TNs reviewed
- Direct inward dials (DIDs) totaled 31,000
- 750+ pro forma invoices were reviewed in 4-6 weeks and validated over 10 different billing runs

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· Migration of the acquired customers into the new system was achieved with a data discrepancy of less than 0.5% in a dollar difference between what the acquired carrier had billed and what TelePacific billed

· Vertek completed the customer billing migration on time and on budget

"The quality of Vertek's work was exceptional and it was the most critical component of the overall migration project. The level of achievement for this systems migration – after the audit of this project – was by far the highest we have ever done."

– A Senior Director at the Leading Competitive Carrier

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