YOUR CONVERSIONS CHECKLIST

With mergers and acquisitions and other changes affecting your systems, data conversions are often inevitable. But without proper planning, you can potentially expose your institution to missing data, conversions that drag on for months, breaches, legacy hardware failures, recurring maintenance costs, increased staffing, efficiency delays, and other risks. Using proper planning, data conversions *can* go smoothly. Here is a checklist that can help you ensure they do.

Determine If You Require a Full Conversion, Or If You Can Operate From a Viewer

A really quick way you can avoid a conversion is to just place your data in a viewer. This will grant you access quickly, but has some drawbacks for go-forward research. Your data will be in two locations, you'll lack integration with your core application (to view legacy data), and you can expect minimal functionality.

Your best option is to convert your legacy data into a go-forward enterprise content management product, so that all of your data is accessible together, and you aren't having to support two systems.

Find the Right Conversion Vendor

Vet your vendor carefully. This is the biggest risk you will encounter when performing a data conversion. Vendors will be in total control of your data. They will be responsible for an accurate data conversion and a secure process to prevent missing data or data breaches. In addition, you may have to defend the vendor decision to your board if something goes wrong with the data or the timelines. Do not get caught looking for the cheapest or quickest solution, but instead, look for a vendor that fits your data conversion needs and is financially stable. You want to make sure the company that converts you today will still be around to support you for years to come.

Have Your Vendor Perform Discovery on Your Data Before You Sign a Contract

Some vendors will perform discovery at no cost to ensure the conversion will be successful and to help flush out any potential issues with the source data or databases prior to your conversion being started. Each legacy system is unique in how data is stored, where it is stored, how indexes are used, and the compression types of the data. Without discovery, there is a major risk of your vendor running into issues that will cause major timeline delays or even contract cancellations due to them not being able to convert the data at all. Discovery also allows you a preview of the conversion approach before a contract is signed.

Can They Perform a Conversion and an Upload into Your ECM Solution Without Using Your Production System?

Vendors sometimes have a virtual environment that mimics an institution's live production environment. This allows a vendor to load data 24/7 into the virtual environment without disrupting your normal daily activity. If they have to load into your production environment, it could adversely affect your staff with performance degradation in research and scanning. You also run the risk of having your production system stalled or crash due to the amount of activity.

Will Your Vendor Provide a Certified Professional Project Manager?

Experienced vendors will provide a certified project manager to help you track the project. Conversions are complicated and without a project manager, the conversion could drag on for months. Project managers act as a central point of contact for all conversion items, freeing you from having to worry about dealing with multiple contacts.

Assign the Subject Matter Expert on the System You Are Converting From to this Project

If you have acquired legacy data through merger or acquisition, make sure and retain the subject matter expert until the conversion is complete. Their knowledge base will help you immensely when it comes time to assign the data to its location in your new system, and they can also provide valuable insight to the history of the system, such as database changes, release information, and more. The risk of not using a subject matter expert could result in items being placed in the wrong location of your new ECM system, slowing down your ability to search for an item or the ability to find it at all.

This information can prove vital to you and your institution to ensure you have a successful, accurate and speedy data conversion. Do not run the risk of data breaches, the inability to provide data for a subpoena, or having to explain your recommendation of a vendor to your board when a conversion goes sour. Do your due diligence upfront and remove unnecessary stress from your conversion.

Enterprise Conversion Solutions (ECS)

When you work with the ECS team from Jack Henry for your next conversion or acquisition, you'll be partnering with one of the largest conversions teams in the United States – proven experts who have successfully converted more than 500 different types of data from virtually every check, document imaging, and signature card platform used in the industry. And because ECS can add items into your data – CIF#, account types, or any other index that did not exist in the legacy data – you'll be able to make your data even better than it was before. You'll also gain options for full item audit of all data from source to converted to loaded, an entire trail from start to end at the individual-item level, a state-of-the-art ECS copy tool that has built-in audits, segmentation, and vastly superior speed over robocopy and other copy tools, as well as a dedicated project manager for every project.