

# Conversion & Migration Assessment



## Solution Overview

The card industry has been shaped by merger and acquisition activity. Along with this trend has been an ongoing stream of conversion activity as companies strive to achieve economies of scale or migrate to new platforms. The migration to outsourced solutions or bringing operations back in-house has also contributed to conversion momentum. To address the recurrence of conversions in the card industry, Keypoint has developed, as part of our Solutions Framework, a Conversion Assessment Service.

## Business Needs

Your organization is faced with defining, planning for and managing a critical portfolio conversion:

- A new portfolio has been acquired or your legacy platform is obsolete and must be migrated to your platform solution
- The decision has been made to outsource or in-source your processing services and your staff lacks experience in managing this type of project
- Your strategic direction is growth through acquisition and several portfolio conversions are anticipated

## Business Solutions

Keypoint has developed the Conversion and Migration Assessment to facilitate the understanding of how best to convert and migrate the portfolio. Using this methodology, Keypoint can determine the optimal strategy and managed risk approach for conversion. The assessment takes an in-depth study of the portfolio and determines the best way forward for the conversion as well as addressing the back-office functions for migration of the business processes.

## Company Information

Keypoint provides planning, analysis, definitional and advisory services to leading organizations in the payments industry that seek to improve their operational performance, efficiency and profitability through the use of best practices and technology. Keypoint has assisted over 500 clients in over 60 countries implement practical, cost effective solutions to address the challenges and opportunities that clients face.

PROJECT PHASE	PROJECT DELIVERABLES
<b>Step One:</b> Assess the conversion requirement	An in-depth study of the current situation and the objectives of conversion which may be outsourcing, new platform, consolidation etc.
<b>Step Two:</b> Evaluate the as-is situation	A detailed analysis of the as-is and to-environments including data analysis for determination of data cleansing and transformation impacts
<b>Step Three:</b> Define alternatives	Define appropriate alternatives for approach which may include Big-Bang, cycle date, time zone, product groupings, account ranges etc.
<b>Step Four:</b> Include back-office processes	Evaluate back office processes for impacts both interim during conversion and post conversion to minimize impacts on service
<b>Step Five:</b> Define the optimal conversion strategy and approach	Define the approach best suited for the client and the portfolio balancing risk, cost, effort and potential customer impacts
<b>Step Six:</b> Document and Present	Document results in detail and present to client along with recommendations and next steps



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