

DATA SHEET

# Legacy Migration Service

## Customer Communication Management

INDUSTRY-LEADING EXPERTISE TO HELP YOU REDUCE COSTS, MITIGATE CONVERSION RISK AND MAXIMIZE YOUR CUSTOMER COMMUNICATIONS



### Benefits

- Ensure a cost-effective, timely document conversion
- Maintain – and enhance – quality of your communications
- Automate the conversion process with an easy-to-use import utility tool
- Dedicated support from knowledgeable and experienced Professional Services staff
- Total flexibility to accommodate your individual needs

### OVERVIEW

Migrating customer communication legacy applications can be a risky, difficult, time-consuming and costly effort. No conversion project is the same and there is no 'push button' easy answer. With old legacy systems, knowledge of original document business rules often doesn't exist, making the process even more challenging. However, with the right tools, process, knowledge and expertise, you can dramatically simplify and reduce risk, errors and costs of this daunting task.

Pitney Bowes Business Insight's (PBBI) Customer Communication Management (CCM) Legacy Migration Service offers a flexible, systematic strategy and approach that combines automated conversion tools and a Professional Services team with proven expertise to efficiently move your legacy applications to our next-generation CCM technology.

Whether you're converting from a legacy document generation system, a homegrown or a Microsoft Word-based solution, using Insurance forms from Accord, ISO, NCCI or your own custom forms, our CCM Legacy Migration Service ensures a simplified, cost-effective transition.

### Unmatched Expertise and Proven Strategy and Tools

As a leader in CCM, we've helped hundreds of companies worldwide create and manage their communications across the breadth and depth of their operations. PBBI's proven experience, best practices knowledge, and legacy migration expertise has helped these companies transition quickly and painlessly to the latest in CCM technology.

PBBI Professional Services experts will work with you closely every step of the way, from analysis and discovery of existing documents and rules, definition of your target document architecture, development of a test bed, validation through a pilot program to the full conversion effort. Our proven process utilizes an automated content conversion utility that has been used worldwide to speed conversions and improve overall quality of the result. Once the framework is developed, the customer can handle conversions on their own, if they choose.

Since every conversion and customer is different, our solution is designed with the flexibility needed to accommodate your individual needs and business challenges.

### Conversion Steps for a Smooth and Cost-Effective Transition

With experts by your side, PBBI's CCM Legacy Migration Service takes you through a five step conversion process. This proven, flexible methodology speeds conversion times and reduces costs, while ensuring the quality of your communications.

We'll define – with you – the document architecture including data models, integration requirements, shared objects and forms, document packages, recipients and output processing. Then we'll take the necessary action – performing the conversion, creating and modifying the data extract/integration programs, handling integration testing and user acceptance testing (UAT), and finally get your system fully operational.

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### Here's a Closer Look How the Process Works

#### Preparation Can Make All the Difference

Thorough preparation and execution of a pilot project can significantly speed and simplify the conversion process. To start the process, we'll map out the current customer communication landscape including policies, claims, agent correspondence, and other documents. We'll also collect existing document samples including state and product variations, where appropriate, as well as assembly rules and existing data models. From these design artifacts, the document architecture and customized conversion solution can be defined. Finally, we'll define and prepare test cases. A pilot project is then implemented to validate the new document architecture and the customized process and make adjustments as necessary to ensure an easier transition for future conversion efforts.

#### 1. Transform

An important first step in our conversion process is to extract content from available resources and convert it to XSL Formatting Objects (XSL-FO) using appropriate tools based upon the source input. Next, we'll identify and convert variable placeholders and define the data model based upon available artifacts. Finally, we'll identify shared objects such as headers, footers, branding, inside addresses, letter closes, terms and definitions, and forms.

#### 2. Import

PBBI's Legacy Migration Service utilizes an easy-to-use batch import utility tool to speed conversions and improve overall quality of the process and your communications. The utility tool is used to create documents or shared content and forms. Naming conventions are based upon source file name and organization is based upon source directory organization (i.e., Explorer folder name -> Design project name).

#### 3. Cleanse

All content is not created equal and as you know, any transformation process can result in some dropped formatting. Our cleansing process is a manual re-application of any lost formatting that may have occurred. If required, we may utilize document comparison technologies to ensure light table compatibility.

#### 4. Apply Business Logic

Our process does not import business/document logic automatically. As all source systems are different, we engineer both document structure and logic for best performance on the new system. We have found that failure to approach the document logic this way results in unacceptable performance and document designs that are cumbersome to manage. Existing systems serve primarily as a guide/design artifact.

#### 5. Test

Our testing process is done incrementally in the design stage. Regression testing is also important to compare the baseline test bed from the existing system to the baseline test bed to the new system. Finally, our process applies fixes first and then repeats the test, as necessary, to ensure appropriate quality.

### Minimized Time and Cost With No Risk to Quality

How much time does a conversion project take? Remember, no conversion project is the same and there is no 'push button' easy answer. To do it right, ensure the quality of your documents, and take in consideration the size of the conversion, you can expect estimated time frames to run:

- Document architecture definition: 4-6 weeks, depending upon scope
- Document/form conversion: 1 hour per form.
- Integration testing and user acceptance testing (UAT): 2-6 weeks. Typically the first project will be longer, to get data extract sound.

When it comes to Customer Communication Management, come to the experts. We offer a fully integrated suite of applications – from document composition to interactive communications to e-messaging to document archiving. And our CCM Legacy Migration Service offers the right process, tools and expertise to significantly reduce conversion time, costs and risk. After all, you deal with risk everyday in your business. You shouldn't have to deal with it in your daily operations.

**For more information on how Pitney Bowes Business Insight can help you reduce costs streamlining document conversion, call us today at 800-327-8627 or visit [www.pbinsight.com](http://www.pbinsight.com).**

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#### PITNEY BOWES BUSINESS INSIGHT

Pitney Bowes is a leader in end-to-end integrated mail solutions. Our leading-edge hardware, software and services can help you grow revenue, cut costs and strengthen customer loyalty, to drive your long-term profitability.

