

# Conversion Planning



## 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. 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 Planning Methodology and templates.

## Business Needs

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

- A new portfolio has been acquired 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 Planning Methodology to facilitate the standardization and accuracy of conversion projects. Using this methodology, Keypoint can manage conversion projects on behalf of your organization, allowing your staff to continue with daily business activities. Or the methodology can be customized for the your organization's environment so that your conversion project team can be trained by Keypoint and equipped with a conversion process that is repeatable and reliable.

## 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	A gap analysis between Destination and Target systems and processes
<b>Step Two:</b> Plan	A detailed analysis and mapping of data guided by Startpoint® templates for triangulated data mapping
<b>Step Three:</b> Model	Conversion utility and data conversion design
<b>Step Four:</b> Build	Test scripts, conversion utilities, built and documented
<b>Step Five:</b> Integrate	Testing, execution of conversion and certification of conversion results
<b>Step Six:</b> Support	Knowledge transfer, workflow and workaround documentation



Conversion Planning  
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