

Data Conversion Services

When Experience Counts

Implementing a new software solution can turn into a full-time job, especially when it comes to data conversion and reconciliation. These tasks require knowledge of both the source and target systems, and you can easily find yourself over your head. CompIntelligence is focused on data conversions and custom programming for stock plan systems, and we pride ourselves in helping companies make a smooth transition from one application to another.

Experience

Each CompIntelligence consultant has years of experience implementing stock plan administration software solutions in virtually every environment from Equity Edge, to Computershare, to EASi. Whether you use Excel or a standard application, we can save you the hassle of converting and reconciling your plan data, so you can be assured of starting with accurate information.

Approach

We take a programmatic approach to each engagement, so that we can convert your data multiple times as we go through the reconciliation process. Our developers have built sophisticated tools to help streamline the conversion process-and we pass the time savings along to you.

Results

As an independent company looking out for your interests, we place high importance on ensuring that the data from your legacy system is converted accurately and the two systems balance. That's why we take the time to understand and analyze your current data before migrating it into your new system.

Once the data has been converted, we run the reports to ensure that the systems balance from shares granted to shares outstanding to shares exercised to shares canceled. We also help with your financial reports reconciliation, and go through them with you so you can explain them to your auditors.

Steps

We go through a very meticulous process to ensure that the data conversion meets the needs of every one of our clients. A specific project plan is developed for each

Key Benefits

- ➔ Experienced professionals in converting data between systems
- ➔ System completely reconciled with legacy data
- ➔ Project managed so you know current status and all of the next steps
- ➔ Independent from your software provider so we look out for your interests

client that to ensure it meets your requirements and expectations. We use the following steps:

Kick Off Meeting

During this conference call, we introduce all of the parties involved so that responsibilities, requirements, and expectations can be discussed, set, and agreed upon.

Data Migration

The focus of this step is to review and understand the current data as it exists in the legacy system. This ensures that when the data is moved to the new system it is brought over accurately. The data is then put in a format so it can be transferred into the new system.

Data Reconciliation

This is the most critical step in the conversion process. The data is checked to ensure that the legacy system and the new system match. We run reports, share and explain them to you, verifying that shares granted, shares outstanding, shares exercises, shares forfeited, and shares canceled are all reconciled. We also help you ensure that your financial reports can easily be compared between the two systems. Our financial reporting professionals work with your team to review and explain the results and make any adjustment that may be necessary. The end result is that you are comfortable with the outcome, and more importantly, that your auditors understand the numbers.

Education and Training

What good would your new system be if you didn't know how to use it? We schedule and organize the training sessions that you need for the right people.

Live Processing

This is the last step in any conversion and that is for you to go live with your new system. But we don't just leave you here; we make sure that you know who to call in the future should you have any questions about your new system.

Along the way, we will have weekly status calls so that everyone knows the progress that is being made and what the next steps will be. This also helps everyone understand whether the project is on time, or if adjustments need to be made.