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RPA Approach to Accelerate Data Migration by 2X

Credits

Vijaykumar

Tamilmani R

Sathish P

Abhay Goyal

50% of the Data Migration Initiatives will Exceed their Budget & Timeline by 2022 Because of Flawed Strategy & Execution- [Gartner](#)

Frequency

and scope of data migration have increased multi-fold with ongoing trends



Mergers and Acquisitions



Migration of Applications to Cloud



Modernization of Legacy Applications

However, the execution of data migration using the traditional way is not at par with the increasing frequency!

3 broad steps involved in data migration using the traditional approach

Planning & Preparation

Assessment, defining scope & phases, building team, and data mapping

Establishing Governance

Defining governance roles & processes, and establishing metrics

Execution

Using the right set of tools, migrating the data from one system to another, and testing



Export



Transform



Load

ETL - Highly structured, rules-based migration activities

Major challenges in the execution of data migration

- **Higher cost & time** - Mock run & sanity test need to be performed for each module
- **Lot of re-work** - Any minor human error in mapping while performing migration can result in loss of functionality and thereby much re-work
- **High manual efforts** - Fallouts due to data integrity issues are handled manually
- Difficulty in rapidly ramping-up and ramping-down teams
- **Lack of API access** in legacy systems



These challenges make a clear case for **RPA to automate the execution of data migration**

Automate & accelerate rule-based migration activities using bots

Performs easy data migration from legacy systems lacking API access, using UI-level integration

Avoids impact on underlying systems and databases - low-risk approach

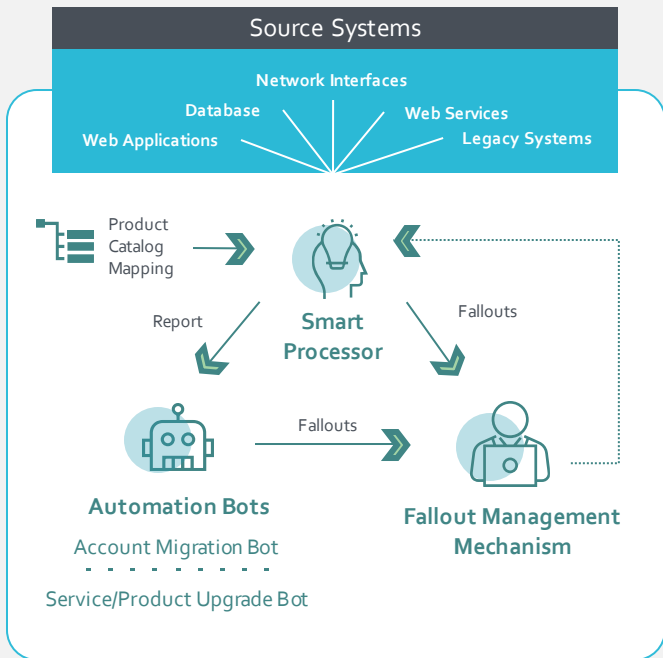
Faster ramp-up & ramp-down of bots

Lower cost and enhanced customer experience

RPA Based Automation Framework for DSPs' Data Migration Execution

Accelerates Data Migration Time by 2X, Reduces Manual Efforts, Improves Accuracy & Saves Op-Ex by 30-40%

RPA Based Data Migration Framework



Components of the Proposed RPA Based Framework



Smart Processor

Analyzes the source data with destination product mapping to **generate report** (type of migration activities to be performed based on customer eligibility) and triggers automation bots

Identifies **data quality & integrity issues** in the source data at a very early stage



Automation Bots

Consumes report from smart processor, verifies report data against destination systems (CRM, inventory system, etc.) and identifies discrepancies

Performs migration/upgrade by extracting & updating data at various layers of the application (API/DB/GUI)



Fallout Management Mechanism

Automates the fallout handling - Fix the data quality & integrity issues in CRM, inventory systems, etc.

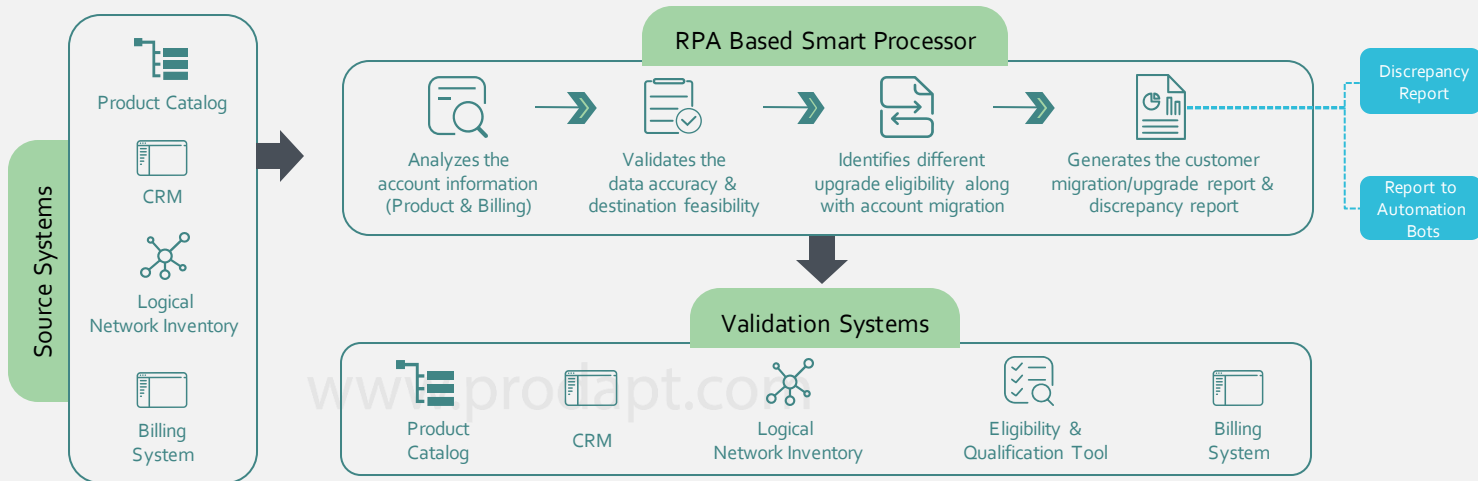
This insight showcases customer account migration as a use case. However, this framework can also be adapted for other data migration use cases.

Smart Processor Evaluates Customer Data for Account Migration & Upgrade Eligibility



Pain Points in Manual Evaluation

Multiple teams are involved in identifying the right scenario (migration/ upgrade) based on customer eligibility, which is a time-consuming process with many iterations.



Illustration

Jade Burton

Crawford, Nebraska(NE), 69339

POTS and 25Mbps Broadband

Account information is pulled from source system(s)



Identifies that along with account migration, the customer is also eligible for 100Mbps speed as he/she is in Crawford Exchange

Report

(contains account migration & service upgrade data)

- ✓ Account Migration
- ✓ Service Upgrade
- × Product Upgrade

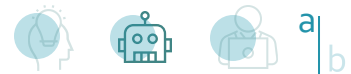
Recommendations

Building smart processor helps in **recognizing** specific customers who are eligible for **strategic upgrade** and provides a **customized rate plan**

Agile model – Configure smart processor and automation bots to work in an agile and iterative manner. Ability to migrate with minimal products/data and scale iteratively.

Smart Processor helps in reducing the lead time by 20% which helps DSPs in improving the customer experience.

Automation Bots – RPA Enabled Customer Account Migration & Upgrades



Major challenges in the traditional approach

Many times account is migrated successfully, however, few key data elements are missed due to improper validations.

This leads to failure of change/modify orders that are placed post-migration.

Example

- A customer migrated from legacy system to next gen system successfully
- However, when a modify order is placed, it gets stuck due to certain mandatory data missed during migration
- These scenarios lead to high customer churn rate

RPA Enabled Customer Account Migration

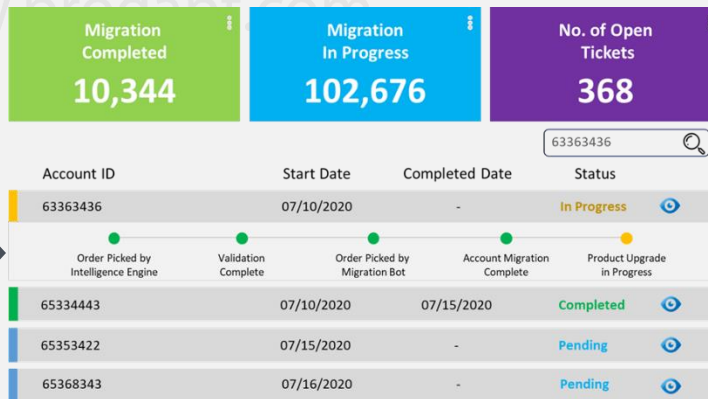


Recommendations

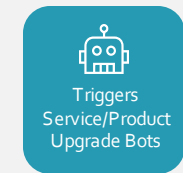
Identify integrity issues in the destination systems early & report to the fallout management teams.
Reduces 30% of fallout (data integrity issues)

Build migration dashboard to track migration at the transaction level to provide higher transparency and traceability.
100% end-to-end visibility of migration KPIs

Migration Dashboard



Reduces 90% efforts that go in manual order tracking, task follow-ups, report generation, and audit/testing



Along with customer account migration from one system to another, using this framework, DSPs can also check & upgrade customers eligible for service/product upgrade.

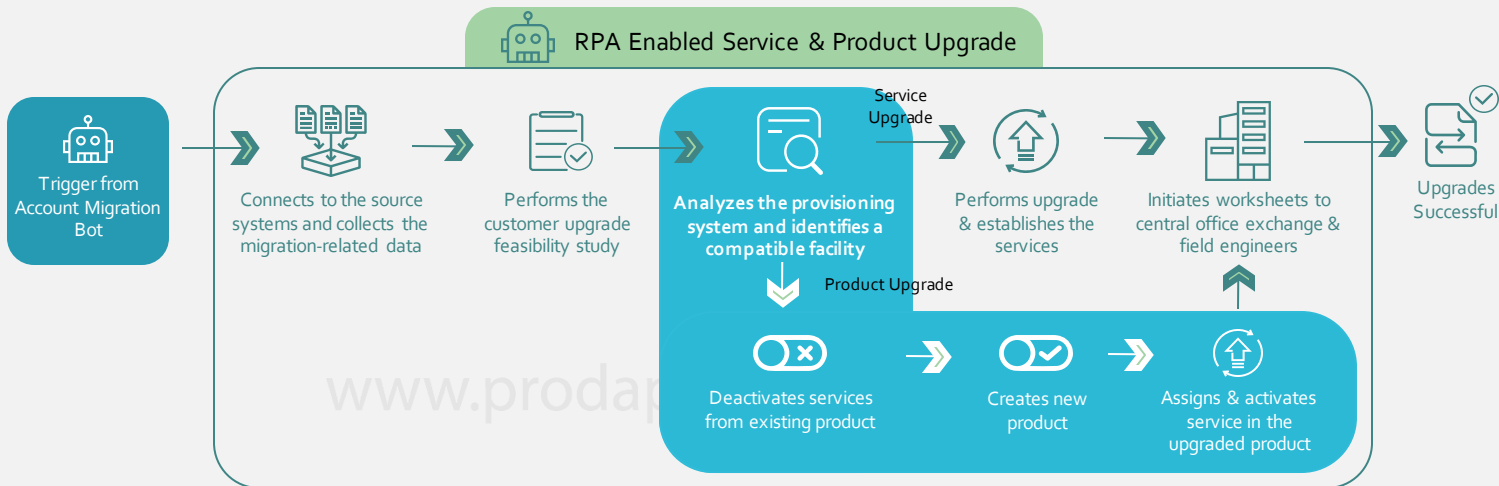
Automation Bots – Achieving Automated Service & Product Upgrade Post Customer Account Migration



Manual approach is complex & time-consuming

Identifying the compatible port based on the equipment profile, DSLAM, traffic profile, etc. is complex and time-consuming.

Negligence in releasing the old facilities or port in the logical inventory induces integrity issues of the inventory systems.



Recommendations

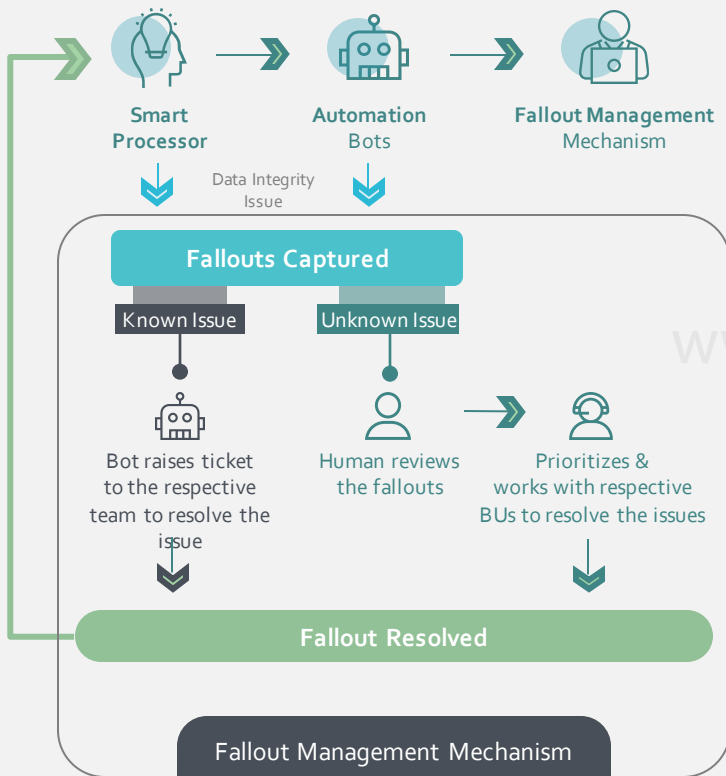
Configure the bots to **simultaneously analyze** multiple systems and **identify compatible port**.
Reduces 30% processing time

Configure the bots to send early notification to field engineers to update the inventory with new facilities.
Helps in meeting the SLAs

60% time reduction leveraging RPA (advanced GUI & backend database search) in identification of facilities

5-10% efforts reduction by eliminating data integrity issues due to human negligence

Fallout Management Mechanism to Capture & Resolve Issues Seamlessly along the Migration Journey



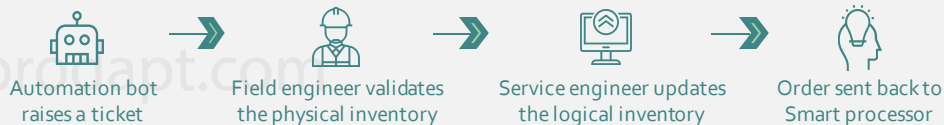
Top Fallout Scenarios

- Mismatch in the logical inventory and physical inventory
- Incomplete migration of products due to incomplete catalog
- Product not groomed in the inventory
- Discrepancy in the billing trails
- Customer is unserviceable

Illustration - End-to-end Fallout Management

Example 1

Mismatch in the logical inventory and physical inventory



Example 2

Incomplete migration of products due to incomplete catalog

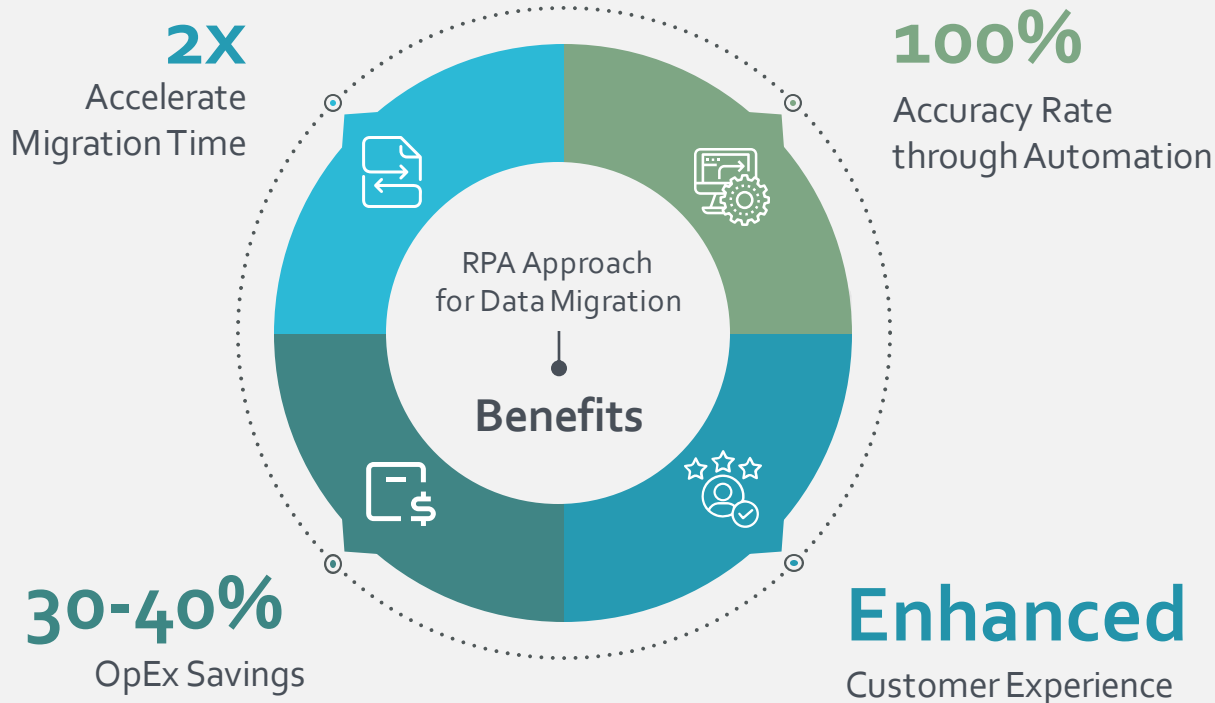


Recommendations

Configure smart processor & automation bots to raise ticket for the known issues.
60%-70% of fallout handling is automated

Build a dashboard to provide a 360° view of the migration related KPIs in real-time – ensures better governance

Business Benefits Achieved by a Leading Digital Service Provider (DSP) in North America Using RPA Approach for Data Migration



Get in touch

USA

Prodapt North America, Inc.
Oregon: 10260 SW Greenburg Road, Portland
Phone: +1 503 636 3737

Dallas: 1333, Corporate Dr., Suite 101, Irving
Phone: +1 972 201 9009

New York: 1 Bridge Street, Irvington
Phone: +1 646 403 8161

CANADA

Prodapt Canada, Inc.
Vancouver: 777, Hornby Street,
Suite 600, BC V6Z 1S4
Phone: +1 503 210 0107

PANAMA

Prodapt Panama, Inc.
Panama Pacifico: Suite No 206, Building 3815
Phone: +1 503 636 3737

UK

Prodapt (UK) Limited
Reading: Suite 277, 200 Brook Drive,
Green Park, RG2 6UB
Phone: +44 (0) 11 8900 1068

IRELAND

Prodapt Ireland Limited
Dublin: Suite 3, One earlsfort centre,
lower hatch street
Phone: +44 (0) 11 8900 1068

EUROPE

Prodapt Solutions Europe &
Prodapt Consulting B.V.
Rijswijk: De Bruyn Kopsstraat 14
Phone: +31 (0) 70 4140722

Prodapt Germany GmbH
München: Brienner Straße 12, 80333
Phone: +31 (0) 70 4140722

Prodapt Digital Solution LLC
Zagreb: Grand Centar,
Hektorovičeva ulica 2, 10 000

Prodapt Switzerland GmbH
Zürich: Muhlebachstrasse 54,
8008 Zürich

Prodapt Austria GmbH
Vienna: Karlsplatz 3/19 1010
Phone: +31 (0) 70 4140722

SOUTH AFRICA

Prodapt SA (Pty) Ltd.
Johannesburg: No. 3, 3rd Avenue,
Rivonia
Phone: +27 (0) 11 259 4000

INDIA

Prodapt Solutions Pvt. Ltd.
Chennai: Prince Infocity II, OMR
Phone: +91 44 4903 3000

"Chennai One" SEZ, Thoraipakkam
Phone: +91 44 4230 2300

IIT Madras Research Park II,
3rd floor, Kanagam Road, Taramani
Phone: +91 44 4903 3020

Bangalore: "CareerNet Campus"
2nd floor, No. 53, Devarabisana Halli,
Phone: +91 80 4655 7008

THANK YOU!