



## SSCP Migration Service - Platform Transition Use Case – Experience of PT Services

**Company Name:** Chazin and Company on behalf of a national, not-for-profit, educational counseling organization.

**The Challenge:** “Our client had been previously implemented on Sage Intacct, by Sage Intacct. Everything had been hand-rolled and their reporting situation was showing its age. This particular project was a Sage Intacct reimplementation.”

**The Goal:** “Our intention was to move their historical data from the initial Sage Intacct instance to a new Sage Intacct instance and enhance their reporting capabilities.”

**The Choice to Work with PT:** “This was an Intacct to Intacct transition and we had not reimplemented anyone’s Sage Intacct system before. Because we had less experience, we couldn’t really estimate the time investment accurately. We’d had bad luck doing the data migrations ourselves in the past and this one was a bear. By contracting with PT we cut the work down significantly and the cost fell into a very narrow range due to the fixed fees. We knew you were the experts at this, you’d do it in a fraction of the time it would take us to develop a process, and Platform Transition would save us the time and effort. The client was also dilly-dallying to provide approval on the required reimplementation which created time-crunch pressure.”

**The Experience of PT’s Process:** “The data migration, although complicated because they’d already gone live, and there were other third-party solutions such as bill.com to integrate - the migration was a success. Everything had gotten done in a very timely fashion, and the team was super flexible when any challenge occurred. The team even worked over a holiday weekend to assure we met the project deadline. The team was very well organized and the project went smoothly.”

**The Greatest Benefits:** “We have a happy client, who had almost zero involvement in the process, we’d completed the migration with ease, with less risk, and we were clear of the data migration costs upfront. In the past, we’d had bad experiences with open-ended data migration project timelines. When we built in too many hours the client would get mad, and then we’d end up eating some of those hours.”

“We can now provide the client the reporting details they want, when they want them, with little to no involvement.”

**Closing Testimonial:** “With outsourcing in general, the benefit is an organization's specialization. We do accounting for a bunch of not for profits and therefore are experts in not-for-profit accounting. We turned to PT because you guys specialize in data migration. Your knowledge of the specifics of this particular problem is obvious and so you are way better at it than my team who does it once in a while. Having that specialized knowledge enables you to get things done a lot better, more efficiently, and more cost-effectively.”

*Thank you for allowing us the opportunity to serve you, your client and for generously sharing your experience and feedback with us. It is with gratitude and humility that we deliver our services on time and in excellence. And we acknowledge you for the time you have shared with us here today.*

Thank you,

Platform Transition