

Clarkston simultaneously completed three unique and complex M&A data migrations, supporting integration and targeted data cleanup from acquirees with unsophisticated systems to the end state technology ecosystem.

The M&A Data Migration team was interested in finding opportunities to streamline and simplify the current migration processes with the goal of reducing the complexity and timeline for 20+ data migrations per year. This project was necessary to migrate clean data efficiently and improve the existing process by removing bottlenecks from the migration solution.

Given that each migration was unique, the team had to understand the nuances across each of the customer data integrations to estimate and build data migration flows that properly cleaned, transformed, and enriched the data prior to migrating to the end-state data solution. Once the data flows were set up for the migration, further testing and validation showed traces of unclean data across inherently more complex acquisitions that required one-off alterations to the data – an atypical approach.

Throughout the project, Clarkston identified opportunities for improvement beyond the standard migration path previously taken. A more streamlined approach with fewer data versions, reviews, and approvals was developed and implemented as a key component to reducing the overall migration timelines.

These complex migrations moved the client from an archaic excel-based system to considering innovative solutions that reached the respective business and technology partners, yielding three successful data acquisitions.

M&A Data Migration

Case Study

PROJECT OVERVIEW

INDUSTRY:



Equipment Rental and
Leasing

PRODUCTS AND SERVICES :



Industrial Equipment and
Supplies, Sanitation
Equipment and Supplies

PRIMARY OBJECTIVES:

- Work collaboratively with the client to understand the nuances across each customer data integration(s) to best estimate complexity and define opportunities to expedite the process and/or to recognize scenarios which may be inherently more complex
- Define qualifiers of data integration complexity, including data quality, data volume, data source (paper vs. digital, number, and types of sources), ability to transform data, and ability to enrich data (e.g., adding data qualifiers to facilitate use of algorithms), among others
- Work with the client to fine-tune the approach, resources, timing, right sizing the teams, scope, and processes

RESOLUTION:

- Reviewed all existing processes, migration tools, and master data files to build a target data perspective
- Compared acquisition data to target data and identified inconsistencies and key target areas for data cleansing activities
- Worked side by side with the acquisition team and sellers to manually clean data
- Identified processes or data risks that would require manual data entry
- Established automated Alteryx flows to migrate clean data to the target system
- Completed three successful migrations after thorough testing

KEY BENEFITS:

- Provided recommendations to simplify the migration process for 20+ future migrations per year
- Established clear objectives for business and technology alignment in the M&A process, including effective documentation review, reduced timelines, and clear communication channels
- Furthered the strategic approach of data acquisition by streamlining manual processes.
- Established new processes and workflows using Alteryx to expedite and facilitate new data integrations in the future



KPIs

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Work with the client to fine-tune the approach, resources, timing, right sizing the teams, scope, and processes

Support data migration across several acquisitions

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