



# Database and Reporting Infrastructure Migration

## Fitness Chain

- Owned and ensured accurate migration from legacy Practice Management System (MBO) to a new system (Zenoti), of data related to Transactions, Usage, Customers, Accounting, Payroll, Inventory, Retail products etc.
- Built new automated dashboards off Zenoti (and MBO temporarily during migration), to provide real-time visibility into the business across various functions, through and beyond the migration process

# Fitness company needs database migration and validation

## Picture this...

You're looking to ensure a seamless transition by validating the business logic implemented by the SI partner and worked with SI partner/system owner to execute the suggested resolution measures. Currently, you are migrating to a practice management system from the legacy system that was in place since inception in 2002. There was a critical need to ensure accuracy of data, and the logic implemented through the migration process.

## You turn to Accordion.

We partner with your team to own and ensure accurate migration from legacy practice management system (MBO) to a new system (Zenoti) of data related to transactions, usage, customers, accounting, payroll, inventory, retail products etc., including:

- 1) Extracting relevant historical data from the legacy platform (MBO) and coordinated the data load for the various services offered. Also, devising the necessary business logic needed to be adopted during the migration process.
- 2) Validating the data migrated into the new system (Zenoti), and suggested changes to SI partner, to align with business requirements
- 3) Building~75 dashboards by leveraging the re-vamped data models and data structures of the new system, to provide continuous visibility into the business for key stakeholders
- 4) Merging the data from the new and legacy systems to create consolidated reports for all studios as only a few of the studios were migrated to the new platform initially

## Your value is enhanced.

You have ensured continuous visibility into transactions, usage, customers, accounting, payroll, inventory, retail products etc. for the business during the migration process. You have identified critical concerns in the billing system of the new platform, pre-empting revenue loss for the client

### KEY RESULT

### VALUE LEVERS PULLED

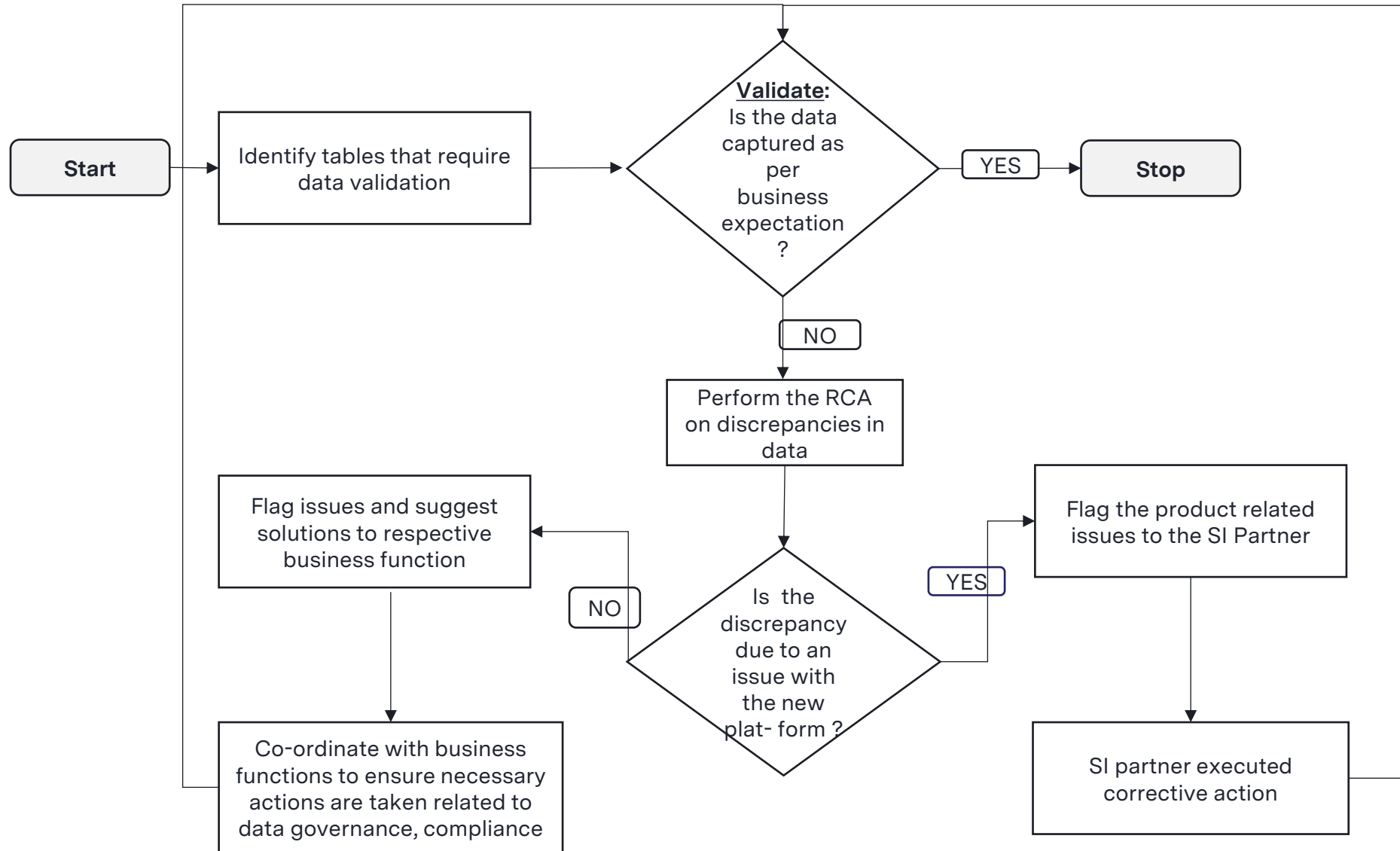
- Validation of data migrated
- Consolidation of reports
- Revamping of data

# Revamped reporting infrastructure to leverage features of new system



CONCERNS IN LEGACY SYSTEM	LEGACY DATA MANAGEMENT SYSTEM	IMPLEMENTATION IN NEW DATA MANAGEMENT SYSTEM
CENTRALIZATION	Data stored in multiple databases, split by Time Zone and Franchise	Leveraged single database for all Corporate and Franchise studios and for all time zones
CUSTOMER TRACKING	Complex to track status of customer across databases as customers are allotted a new profile if transferred from one database to other, leading to potential overstated metrics	Ensured reports leverage aggregated profiles of customers
DATA REFRESH	Data refresh happens only once per day	Used flexibility to create live connections to show real-time analytics
MEMBERSHIP FLEXIBILITY	Membership status is assigned for a fixed period of 1 month. No change can be done to the current status once the month starts.	Updated KPI definitions to account for removal of membership status restriction
VISUALIZATION	No reporting/visualization tool linked. Data had to be pulled in Excel file for analytics.	Tableau is the main front-end reporting and visualization tool directly linked to the back-end live database

# Validation process of data in the new system



# Critical issues identified and resolved in the migrated and live data

DATA DISCREPANCY	IMPACT	ROOT CAUSE
Double Billing of memberships	Some of the students' accounts, in the studios that re-opened after migration, were wrongly billed twice	Student accounts for closed studios were not migrated appropriately and closed studio data was not initially exposed into the new platform for validation
Incorrect Gift card and On-account balances	Few students had a higher balance on their Gift Cards and on their Accounts	Negative balance in the Gift Cards is loaded as positive balance; Account balance for few customers was loaded twice
Incorrect Inventory on-hand data	The Inventory team were unable to manage the Inventory properly	Few purchase orders were not loaded into the new platform resulting in inaccurate On-Hand Inventory
Membership status is captured inaccurately	Few members were practising in the studios without any payments. This was resulting in a revenue loss.	Customers who added memberships to cart and discarded the transaction were also getting an active membership status
Non-recurring memberships are not expired even after the expiry date	Students with Non- Recurring memberships are accessing the studios even after the membership expiry.	Expiry date of non-recurring memberships was not being honoured in the new platform

Reports migrated by function, #

