



# Driving Successful Tool Adoption & Data Migration for a High-Volume Service Business

## Service Area Alignment

- ✓ Improving Change Management & Tool Adoption
  - ✓ Fixing Unstructured or Poorly Documented Processes
  - ✓ Improving Operational Governance & Visibility
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## Client Overview

A US-based service business was undergoing a shift in operations and decided to implement a **new platform** to better manage bookings, operations, and customer records. With transactions already underway, a **smooth and timely rollout** of the platform was critical to business continuity. The PPS Consulting team—led by Rashmi—was brought in to lead the platform evaluation, **data migration from legacy records**, user training, and go-live readiness under a tight timeline.

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## Challenges

- **Time-Critical Rollout** – The platform needed to be fully operational before new services went live.
  - **Unstructured Historical Data** – Legacy records existed only as scanned PDFs, containing critical booking and service details.
  - **System QA & Vendor Coordination** – The platform required testing, refinement, and coordination with the vendor before launch.
  - **Change Management for Diverse Users** – Teams unfamiliar with the new system had to be trained quickly and effectively.
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## Our Approach & Solution

### Step 1: Platform Readiness & QA Validation

- Conducted a full feature review to match operational needs.
- Created and executed a **test plan and QA checklist**.
- Worked directly with the platform vendor to identify issues and implement fixes.

### Step 2: Data Extraction & Structured Migration

- Extracted relevant data from legacy documents (e.g., scanned service agreements, historical bookings, and terms).
- Translated unstructured inputs into a **clean, structured format**, then migrated into the platform.
- Created **access-controlled logins** for team members to reflect operational roles and responsibilities.

### Step 3: Go-Live Coordination & System Testing

- Simulated real transactions and workflows using **live data** to ensure platform stability.
- Coordinated closely with the vendor for final fixes and go-live readiness.



## Step 4: Change Management & User Enablement

- Developed **step-by-step SOPs and role-specific training manuals**.
- Conducted interactive user training sessions tailored to specific responsibilities.
- Ensured users were equipped and confident to use the platform independently.

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## Results & Impact

- 🚀 Smooth platform rollout, aligned with business readiness timelines
- 📁 Accurate migration of historical records, preserving service continuity
- ✅ User confidence and adoption achieved through structured training
- 🛠️ Minimal operational disruption, with active support throughout the transition
- ★ 5-star client feedback, with continued collaboration opportunities

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## Client Feedback (Implied Impact from Success)

*"Rashmi led this project with clarity and urgency. From structuring our historical records to training our team on the new platform, her work made all the difference. Seamless, efficient, and reliable."*

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## Final Takeaways

- ✓ Change management is most effective when paired with **hands-on support and operational empathy**
- ✓ Even unstructured legacy data can be transformed into **structured digital workflows** with the right approach
- ✓ Platform rollouts succeed when users are empowered—not just trained

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## About PPS Consulting

PPS Consulting enables small and mid-sized businesses to **adopt new systems, standardize processes, and scale operations confidently**. We specialize in tool implementation, process design, and structured change management.

**Planning a platform transition? We can help. Let's talk.**

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