MIGRATING TO WELLDATABASE

Five simple steps we take together to help you move to the best data platform ever.

A PRETTY BIG DEAL

No, we're not talking about Ron Burgandy, we're talking about the process of changing from your previous data provider to WellDatabase. At first thought, this might seem like a daunting task. Most companies have a backlog of engineering / data tasks, and it seems like a terrible idea to stack another one on top of that list. Fortunately, we are here to make this as easy and painless as possible.

The fact of the matter is that our competitors want it to be as painful as possible to leave. They just aren't good enough to keep you through quality products and services. Furthermore, that painful migration process you're remembering was moving to them. And those purge clauses, well there's only one real reason to have those. Don't worry about any of that though. We have helped dozens of companies move to WellDatabase and we'll line out the 5 simple steps we take with you to accomplish the migration.

1. Getting Started

2. Assess and Plan

3. Data Preparation and Transfer

4. System Integration and Testing

5. Go-Live and Continuous Support

GETTING STARTED

1 THE INK IS DRY ON THE CONTRACT AND WE'RE READY TO GET TO WORK.

The first step here is a part of the broader onboarding process to help ensure we are all on the same page.

This is a quick step that just helps set the foundation for things to come.

- **Welcome Meeting:** First thing is to welcome you to WellDatabase and introduce you to the onboarding process.

- **Assign & Meet your Dedicated Support Team:** Introductions to the team that will be with you throughout the entire process. You'll meet the people and will be given the contact details of your dedicated account manager and support team who will guide you throughout the migration process.

- **Outline the Migration Process:** For this meeting, we just hit on a brief explanation of the key steps involved in migration to our data service, so you know exactly what to expect.

- **Schedule Next Steps:** The next steps will include training and meetings with the various groups that will need to be involved with the migration. We prefer to dedicate time to each group individually to help ensure that their exact needs are understood.

ASSESS & PLAN

GROUP MEETINGS AND INDIVIDUAL ONE-ON-ONES HELP US FOCUS ON THE NEEDS OF EACH GROUP AND ENSURE A PLAN IS IN PLACE FOR A SMOOTH TRANSITION.

2

We will step through the following with each group:

UNDERSTAND YOUR NEEDS

An initial consultation to understand your specific data requirements, workflows, challenges, and goals. We like to fully understand what you are up against, rather than just what data you need. This helps us ensure that the solution is an exact fit for your goals and ideally, streamlines many of your processes.

DATA AUDIT

Review the group's current data systems and identify the necessary steps for migration, including data formats, volumes, and any integrations required. This is an integral step, as this audit will help us ensure that you are clear of any purge requirements from your previous data provider. The good news here is that after WellDatabase is in place, you'll never have to worry about purge requirements again...we don't do that.

CUSTOM MIGRATION PLAN

Develop a tailored migration plan that includes a timeline, key milestones, and responsibilities, ensuring alignment with the customer's business operations.

DATA PREPARATION AND TRANSFER

NOW WE'RE READY TO ROLL. WHETHER YOU ARE PROVIDING THE TECHNICAL RESOURCES, OR WE ARE, WE WILL BE THERE WITH YOU EVERY STEP OF THE WAY.

3

Each group's migration plan will consist of the following steps:

Data backup

As smoothly as this typically goes, we still want to back up everything that is in place. After doing this as many times as we have, we recognize that things can go sideways. This backup will ensure that we are able to roll the data back easily in case of an issue.

Data cleansing

During the planning phase, we will have identified any specific data points that need to be cleansed and/or processed in a specific way. We'll then assist you in cleaning and organizing the data to ensure that only relevant, high-quality data is transferred.

Secure data transfer

There are a variety of different formats and methods for accessing the data. We will work with you to ensure that the data you need is getting to right places, and that the process involved is easy to maintain. Throughout this process, we'll ensure compliance with all security protocols and privacy regulations.

4 **Things are looking good, and the data has been transferred. Now before we have a party, we'll need to tie up all the remaining loose ends.**

INTEGRATION WITH EXISTING SYSTEMS

This step is only required for true integrations where data is being dynamically pulled into internal systems. This could be anything from internal databases, to CRMs, ERPs, or other business systems. Whether integrations to those systems require API calls, direct database access, or combinations of access methods, we'll make sure the systems get fully integrated.
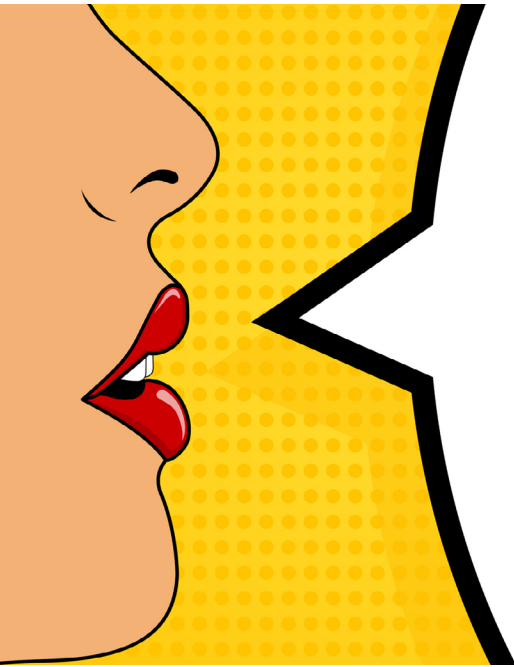
TESTING AND VALIDATION

As a part of the plan, we'll establish a number of tests that we'll use here to make sure that all data has been transferred correctly, and that the system is functioning as expected. We'll also validate data accuracy and accessibility to all systems affected.

PROVIDE TRAINING

At this point, we typically have provided general training on our portal and other tools. We'll also have been working closely with the technical team throughout the migration. The training at this step helps ensure that all users understand any new workflows, naming conventions, and datasets available. The goal here is to ensure that all users can effectively utilize the new system.

GO-LIVE AND CONTINUOUS SUPPORT

WE'VE MADE IT. DATA HAS BEEN TRANSFERRED,
INTEGRATIONS CREATED AND TESTED, AND USERS TRAINED
ON THE NEW DATA & SYSTEMS.

5

Sounds like a good time for a pizza party, right? Well, before we do that celebration, we want to take an extra step to make sure that everything is going well.

Go-Live: This step is sometimes a foregone conclusion for some groups and a major step for others. Regardless, we'll pay special attention to everything involved to ensure there are no snags as everything goes into production. Our goal here is to ensure a smooth transition with minimal disruption to operations.

Ongoing Support: Unlike some of our competitors, the onboarding is just the first step for us. We will provide continuous support post-migration, including access to a help desk, troubleshooting assistance, and regular check-ins to address any concerns or optimize performance.

Review and Optimize: Everything we planned went great of course, but as you continue to use the system, we may find areas for improvement. Knowing that this can be the case, we'll go ahead and schedule regular follow-ups to review the system's performance, gather feedback, and suggest any necessary adjustments to improve your experience.

PIZZA PARTY

YOU REMEMBER HAVING A PIZZA PARTY AT SCHOOL? IT WAS
THE BEST. WE THINK IT SHOULD STILL BE THAT WAY.

5.1

CELEBRATE THE TEAM

We recognize that most of us technical types don't always get recognition for the work we put in. If everything goes right, well, it was supposed to. If things go wrong...let's just say they won't go wrong. Regardless, we want to show you just how much we appreciate your effort in helping WellDatabase, and your company. We'll coordinate with you to make sure everyone has the pizza they like (unless it's pineapple...we have our standards), or whatever the team wants for lunch on us. Everyone deserves a reward for a job well done.

NO HEADACHES HERE

It sounds like a pain but trust us when we say that this process will not be nearly as bad as you might be thinking. WellDatabase was founded by data nerds, and we know exactly what you are up against. We have gone to great lengths to ensure that we provide access to data in multiple formats, multiple access methods, and simplified the whole process. Our data is logically organized and a breeze to understand.

If you think moving data providers is going to be a big headache, reach out to us and we'll be happy to set up a meeting with you and any technical teams to discuss the details. We promise you will be amazed at how easy it will be.