



## Platform Migration Lessons From the Smart Data Team

Every platform has a story. For Smart Data, the story began 15 years ago in the midst of the dotcom boom, as our first Web-based offering to help companies manage purchasing data. Back then Smart Data Online (SDOL) was considered next-gen, an innovative update to Smart Data for Windows.

Over the next decade, Web technologies outpaced what Smart Data Online could deliver, and smartdata.gen2 was launched in 2007. That launch set the stage for the beginning of a migration plan to phase out SDOL.

### Migratory Patterns

The SDOL migration was completed over several years. Although many companies remained on the tried and true (and increasingly obsolete) platform, each year migrations increased and new signups declined. Efforts ramped up in 2011 with a full focus on completing the switch. Despite the challenges of retraining company users, a massive number of issuers, companies, users and cards moved to smartdata.gen2. For one issuer, more than 50 million transactions were moved.

Today the new Smart Data is the most visited web property for MasterCard. The functionality and user base of Smart Data Online remain part of the new system. With its flexibility and easy customizatn, the platform continues to host a very diverse customer base, including small- and mid-sized businesses, universities, Fortune 100 companies, and federal and local governments.

“Our success is the result of an investment in people, process, and technology that also delivered important lessons for future MasterCard customer software migrations,” says Angela Jones, group head, Commercial Information Platforms. Phasing out SDOL required:

- Careful handling of customer relationships
- Concentration on service

- Continued updates to smartdata.gen2 to ensure parity and superiority to SDOL functionality
- Gradual wind-down of technical support for SDOL
- Robust customer communication, training, and assistance with migrations

Paul Moran, senior business leader, Customer Information Platforms, who led the final phase of the effort, stressed the importance of proving the customer's business case, communication and expectation-setting during the process. Kim Martin, group head, Commercial Solutions in Operations & Technology, emphasized the need to make the migration as turnkey as possible. See the video above for more insights.

### **A Sendoff to Remember**

Late last year, about 80 employees from Commercial Products and Operations & Technology gathered in O'Fallon to reflect on SDOL's long-tenure in the market and to recognize the talents involved in building, managing and migrating its many users to the new Smart Data platform.