



CLIENT CASE STUDY:
Professional Services – Workforce Augmentation

**Bridging the gap:
Data migration
without the staffing
burden.**

Following a major technological transformation, a financial services company engaged SEI's Professional Services to get the resources they needed to support data migration across multiple systems. Through SEI's workforce augmentation service, the firm was able to access a specialized team with the technical and business expertise they needed, without a long-term commitment.

Successfully migrating data takes time, people, and expertise.

Migrating data between systems is a challenge. To avoid common pitfalls like data quality issues, security risks, and compatibility issues, a team of experts should be dedicated to overseeing the process. Following a major technology and business transformation, the firm was lacking the internal resources needed to migrate data from their wealth accounting system to the rest of their ecosystem. Rather than temporarily hiring part- and full-time employees, the firm engaged SEI's Professional Services to augment their workforce.

Access to specialized resources without the overhead.

Through our Professional Services team, the firm gained access to expert resources focused solely on solving their data migration issues. The project team included a senior business analyst, a senior data analyst, three data analysts, and three extract, transform, load (ETL) developers. They were tasked with:

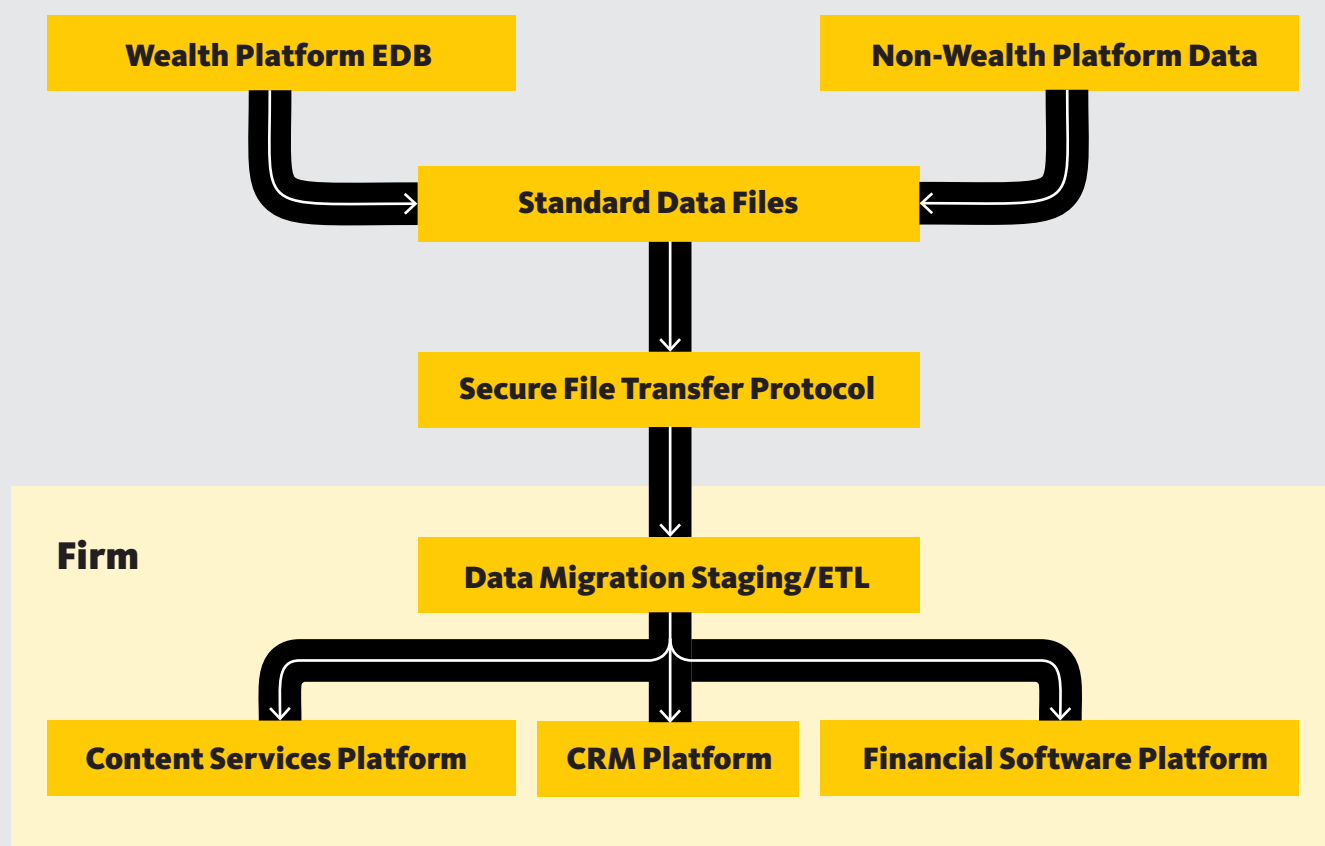
- 1. Firm data profiling and analysis
- 2. Mapping and documenting the data
- 3. ETL building and testing
- 4. Execution of the data migration

Our project team worked on a nightly basis to transfer the data from the wealth accounting system into the firm's data repository. This included pushing anti-money laundering (AML) files from the system to the firm to support the firm's own compliance processes. The team provided imaging and metadata through a content services platform for image retrieval, storage, and archiving purposes. They connected the account performance data from the firm's top clients to a third-party analytics and visualization platform and transferred pension files from the firm's previous wealth accounting system to the new platform.

Throughout this process, the team ensured all system data was shared through a secure file transfer protocol (SFTP) to the multiple systems that make up the firm's ecosystem. Following the completion of their work, the team provided the firm with documentation around the analysis, mapping, technical design, ETL code, test plans, and execution results.

CLIENT PROFILE

A financial services company with about 5,000 employees that specializes in private banking, trust and investment services, traditional and online banking, and commercial banking with approximately \$35 billion in assets under administration (AUA).



For illustrative purposes only.

Migrating data on time and on budget.

Through SEI's workforce augmentation service, the firm was able to tap into specialized resources—from technical leads to business analysis—to supplement their team. Unlike part- or full-time equivalents, SEI's project team came without a long-term commitment. By leveraging their technical and industry expertise, these resources helped the firm to successfully complete their migration faster and at a lower operational cost.

Our workforce augmentation service.

Workforce augmentation provides a client with a pool of experienced and trained resources who can supplement a firm’s workforce with subject matter expertise and experience.

Potential scope

Outsource and/or supplement a firm’s workforce in the following areas:

- Systems integration
- Data cloud and analytics
- Application design and development
- Organizational change management
- Outsourced CTO/Co-CTO

Potential benefit to your business

By leveraging SEI’s Professional Services to augment or supplement your existing workforce, you can access cost savings and expert knowledge and experience for your firm without having to hire a full-time employee.

Contact us at SEIProfessionalServices@seic.com to learn how SEI’s Professional Services can power your business.

