

# LET **33FLOORS** BE YOUR GUIDE

## Change is good. But going through change can be difficult.

At 33Floors we help clients manage change in their Yardi implementations, or adopt Yardi for the first time, every day. Our clients often have concerns about how their operations will be affected by new processes or large migrations of vital data. In this report we answer some of the common questions we're asked about Yardi transitions.

### What platforms do 33Floors clients typically transition from?

33Floors can assist a business transitioning to Yardi from virtually any alternative platform. Our clients typically transition from a common alternative like MRI, JD Edwards or QuickBooks, a custom database, or even a collection of spreadsheets. They're looking for a single platform that offers a comprehensive set of management and accounting tools for the real estate industry, which they are not getting from their current system.

### What does a typical transition to Yardi look like?

Every Yardi implementation must be tailored to suit the customer's unique needs. In some ways, no two transitions are the same, though there are common scenarios: upgrades to Yardi Voyager, adopting Yardi PayScan, or implementing an add-on module like Yardi Advanced Budgeting & Forecasting (ABF), to name a few.

The size of the company is a key factor in the complexity of any Yardi transition. 33Floors finds that small clients take about six to eight weeks for a full transition. Mid- to large-size firms typically require more customization, more discovery, and a more detailed process flow analysis and, as a result, have longer implementation phases that may require up to nine months.

### How does 33Floors approach transitions?

33Floors has a standardized approach to every transition to ensure consistency and success. We're in it together: Throughout the process, we maintain project plans in a cloud environment where the client is invited to participate. We strive for a shared, transparent understanding of what 33Floors is doing.

33Floors has developed a proprietary set of implementation templates we follow to guide each project. Our templates are designed with flexibility in mind, so as a client's implementation goals evolve our plan can rapidly adjust.

#### A 33Floors implementation project steps through the five stages of our preferred management process:

- (1) Discovery of requirements and goals.
- (2) Design to meet requirements and incorporate the client's unique workflows.
- (3) Pilot to show the client that requirements were met (at a high level).
- (4) User acceptance testing (or UAT) to verify functionality.
- (5) Go-live and hypercare support service to ensure success.

## How does 33Floors make the transition to Yardi easier?

The 33Floors team combines deep technical knowledge with extensive real-world experience as real estate professionals. We draw on this mix of expertise to customize Yardi in a manner that meets our clients' practical and technical needs. Our end-user training program is based on the program Yardi itself uses to train its own employees, which facilitates buy-in and improves efficiency in the early stages of rollout.

## How does 33Floors protect a client's data integrity during the transition process?

### 33Floors approaches a client's data with a three-stage process:

**Data Cleansing**— Over the years, firms accumulate incorrect, irrelevant, redundant or incomplete data. Cleansing data before a migration avoids migrating improperly formatted or incomplete records. 33Floors works with the client to analyze its database for problems using our custom tools, and remains closely involved as efforts are made to address issues.

**Data Migration**— Key questions related to data migration include how much historical information is needed in the new system and how much detail needs to be retained. 33Floors recommends transitioning at least one year's worth of history to allow at least one year of lookback. Some clients need to migrate substantially more.

**Data Validation**— Verifying the accuracy and completeness of migration is essential. Validation involves comparing test reports generated by the old platform and the new environment. For clients upgrading an existing Yardi implementation, data validation can be a relatively simple apples-to-apples comparison. During a transition to Yardi from a different platform, 33Floors prepares custom reporting templates so a one-to-one comparison can be made with the old platform's reports.

## How can end users quickly get comfortable with a new way of working?

Any Yardi transition must account for the discomfort that often comes with change. Many businesses adopting Yardi for the first time have relied on their existing platform for a decade or longer. Getting used to a new interface and reporting system can be a headache.

Training is crucial for getting users comfortable with the new platform from day one. Our unique approach to training schedules courses to coincide with launch day, so users can walk out of their training sessions and immediately begin using what they've learned. In our experience this approach dramatically improves retention and fluency.

We also work hard to ensure that the client's new implementation generates reports that match what the client is accustomed to. In addition to presenting the same information, we also strive to match the previous reporting system's familiar look and feel. Among other things, this ensures the first reports generated by the updated platform will dovetail into the client's next reporting period.

## Let 33Floors Be Your Guide

Helping clients make transitions, either as upgrades to an existing Yardi platform or to Yardi from another system, is a specialty of 33Floors. Do you have questions about how your business can best achieve its data management goals with Yardi? Let 33Floors guide you.

