

The SpadeVista Migration

A planned, methodical transition designed around the way your business should run — and built to deliver value early.

A platform change is one of the few moments a business gets to deliberately design how its work should run. We treat it as exactly that: an engineered improvement, planned in detail before anything is built.

The work starts with depth. We map every workflow, integration, data structure and dependency in your environment, then design the future state around how the business should operate — deliberately, with each decision made on evidence rather than inherited by default. **The platform is the vehicle. The improved process is the deliverable.**

That level of rigor traditionally took twelve to twenty-four months. Our methodology, accelerated by **HoosAI**, removes the manual effort in mapping, configuration and data reconciliation — so the thinking happens in weeks rather than quarters, with senior engineers making every judgment call. The result is a designed operating model on fixed scope and a firm date: **typically 90 to 120 days from kickoff to go-live, timed precisely to your contract cycle, with your business running without interruption throughout.**

THE METHODOLOGY APPLIED TO MIGRATION

STAGE 1

Dig Deeper

Map the environment in full — every workflow, integration, dependency and data structure — and baseline how the business performs today in numbers.

STAGE 2

Gain Clarity

Design the future state deliberately, decide what each process should become, and quantify the delta difference. Fixed scope, fixed price, firm date.

STAGES 3-6

Solve Smarter

Build to the design, migrate validated data, and run in parallel — so value lands early and operations continue uninterrupted.

WHAT'S DIFFERENT

	Traditional implementation	SpadeVista
The objective	Reproduce existing functionality on new software	Design and deliver the operating model the business should run on
Time to value	Value arrives at the end, if the project lands	Working software in weekly demos from week five; full value at 90-120 days
Planning	Requirements gathered at face value, designed as you go	Full environment mapped and future state engineered before build begins
Build	Hand-coded, sequential, vendor-paced	Accelerated configuration, engineer-reviewed, in weekly working sessions with your team
Data migration	Addressed late, under time pressure	Planned from day one; mapped, reconciled and validated well before cutover
Business continuity	Single cutover event; disruption absorbed by your staff	Parallel operation and phased validation — the business runs throughout
Risk	Open-ended scope, cost overruns, stalled projects	Fixed scope, fixed price, a named delivery owner throughout
Ownership	Ongoing licensing for continued access	You own the platform and your data, outright

WHY TIMING DECIDES EVERYTHING

Existing contracts typically auto-renew on a notice window of 60 to 120 days before term end. That window, not the expiration date, is the real deadline — and it determines when planning has to begin for the transition to land where you want it.

A 90-120 day transition should begin 4-5 months ahead of the renewal notice date — measured from the notice window, not the expiration date.

Engaging at 60 days out places the notice window behind you, committing the business to another full term before the design work has even started.

Beginning with runway puts go-live in the same week the current term concludes — no overlapping cost, no compressed schedule, no renewal by default.

The first question worth answering: **what is the exact date notice must be given on your current agreement?** Establishing that is step one of Stage 1 — at no cost or obligation.

THE JOURNEY AT A GLANCE

Stage	Timing	Outcome	The SpadeVista difference
1. Discovery	Weeks 1-2	Current-state snapshot and engagement plan	Environment mapped in days, not weeks — and the timing plan built before anything commits
2. Blueprint	Weeks 3-4	Future-state design, fixed-scope proposal	Multiple future-state options modeled and priced, so the decision rests on numbers
3. Build	Weeks 5-9	Working platform, reviewed collaboratively	Configuration accelerated by HoosAI, reviewed by senior engineers, shaped with your team weekly
4. Data & parallel run	Weeks 8-12	Reconciled data, trained staff, systems side-by-side	Field mapping and reconciliation planned from day one — the step most migrations leave until last
5. Cutover	Week 13	Live on SpadeVista, timed to your contract cycle	Validated go/no-go checks and final sync — the outcome proven before the switch
6. Support & Success	Week 14 onward	Stabilized platform, named owner, growth roadmap	A dedicated Technical Success Manager, not a ticket queue

Six stages, roughly 90–120 days kickoff to go-live for a typical mid-market implementation, followed by ongoing Support & Success. Larger or multi-site migrations phase by location or module on the same framework.

DIG DEEPER — ESTABLISH THE CURRENT STATE

1. Discovery & Current-State Snapshot

WEEKS 1-2 · NO COST

Objective: Build a complete, evidence-based picture of how the business runs today, and establish the timing the transition must be planned around.

- Kickoff workshop with your team: goals, priorities, must-haves.
- Inventory current systems, workflows, and integrations.
- Review the existing agreement — renewal date, notice window, data-export rights.
- Interview the people doing the work daily and document the practices that never appear in any specification.
- Map existing data and documentation into a clear current-state picture.

THE SPADEVISTA DIFFERENCE

We map an environment in days rather than weeks, which means the engagement plan is built on a complete picture — not on a sample of it.

MILESTONE

A current-state snapshot baselined in numbers, and an engagement plan with timing sequenced around your contract cycle and your operating calendar — so the transition never competes with your business.

GAIN CLARITY — DESIGN THE FUTURE STATE AND QUANTIFY THE DELTA

2. Future-State Blueprint & Business Case

WEEKS 3-4

Objective: Design how the business should operate, decision by decision, and quantify what that design is worth.

- Design the future-state workflow for each priority area, deciding deliberately what each process should become.
- Quantify the delta difference — cost, hours, capacity and risk, current state versus future state.
- Prioritize modules: what launches at go-live versus what phases in after.
- Deliver a fixed-scope, fixed-price proposal with a go-live date tied to your contract cycle.

THE SPADEVISTA DIFFERENCE

SpadeVista Accelerator models several future-state configurations and their returns quickly, so the business case rests on real numbers rather than estimates.

MILESTONE

A future-state blueprint, a quantified delta difference, and a signed fixed-scope plan.

SOLVE SMARTER — BUILD, MIGRATE, PROVE, TRANSITION

3. SpadeVista Accelerated Build

WEEKS 5-9

Objective: Build to the design in the open, with your team seeing and shaping it every week.

- Configure core modules to the blueprint.
- SpadeVista engineers, accelerated by HoosAI, assemble workflows, forms, and integrations.
- Every component is reviewed, refined and hardened by a senior engineer before it ships.
- Weekly working sessions with your team; feedback folded in immediately, not at the end.

THE SPADEVISTA DIFFERENCE

The speed comes from our methodology, not from automation alone. HoosAI drafts configuration, integration scaffolding and workflow logic in a fraction of the time — our engineers decide what is right for your business.

MILESTONE

A working platform your team has shaped through weekly collaboration — refined together, iteration by iteration.

4. Data Migration & Parallel Run

WEEKS 8-12

Objective: Move data with full validation, and prove the designed process performs while the business continues running as normal.

- Extract, map, and cleanse data from the existing system.
- Load and reconcile historical records.
- Run SpadeVista alongside the current system — side-by-side validation, not a leap of faith.
- Train your team on the new platform while both systems are live.

THE SPADEVISTA DIFFERENCE

SpadeVista-led field mapping and reconciliation, accelerated by HoosAI, is planned from day one — the step most migrations address last, and the one that most often causes them to slip.

MILESTONE

A validated, reconciled dataset and a trained team — signed off before the existing system is deprecated.

5. Cutover & Go-Live

WEEK 13 · TIMED TO CONTRACT CYCLE

Objective: Transition on the planned date, with the outcome already proven.

- Final data sync and go/no-go checklist.
- Transition window scheduled around your operating calendar to minimize disruption.
- Previous system deprecated; data-export rights exercised and confirmed.
- Day-one support on-site or on-call.

THE SPADEVISTA DIFFERENCE

Nothing about go-live is a first attempt. The system has already been proven in parallel against live operations, so the transition is a scheduled event rather than a risk.

MILESTONE

Live on SpadeVista, with the previous agreement concluding the same week — no overlapping cost.

6. Support & Success

WEEK 14 ONWARD

Objective: Stabilize the new operating model and keep advancing the delta difference well past go-live.

- Elevated support window with daily check-ins through the first weeks.
- A named Technical Success Manager assigned to your business, not a ticket queue.
- Scheduled monthly touch points and a monthly status report against your goals.
- Technical readiness assessments, optimization recommendations and a roadmap for the next modules or locations.

THE SPADEVISTA DIFFERENCE

Go-live is where most vendors hand you to a queue. Our Support & Success offering assigns a named Technical Success Manager with pre-paid weekly hours for strategy, design and consulting work — so the operating model keeps improving after the project ends.

MILESTONE

A stable platform, a named person accountable for your account, and a measured result against the Stage 1 baseline.

THE EARLY-START ADVANTAGE

Planning of this depth needs runway. Start early and it fits comfortably.

A transition engineered to this standard earns its speed through preparation. Every stage builds on the one before it, so the single variable fully within your control is when you begin. Start with room and the design work, validation and parallel run all fit comfortably inside your contract cycle — which is precisely what allows value to arrive early rather than late.

Free discovery, locked timing

A no-cost, no-obligation Stage 1 Discovery — including a review of your current agreement's renewal and notice terms — for any engagement beginning four or more months ahead of the notice deadline.

Price protection

Committing to a start date before the notice deadline locks the fixed-scope price quoted at Stage 2, protected from mid-project scope creep.

Priority build slot

The first cohort in a given vertical each quarter receives priority scheduling for the build stage — meaningful when go-live is tied to a firm date.

Own your timeline — a transition planned around your business, on your schedule, without a day of disruption.

WHAT YOU OWN AT THE END

The platform	Built around your workflows, owned outright. No per-seat licensing, ever.
Your data	Migrated, reconciled and validated — in your environment, under your control.
The measurement	Results reported against the current-state baseline captured in Stage 1. If the delta difference didn't close, you hear it from us first.
A named owner	A Technical Success Manager accountable for your account after go-live — not a ticket queue.

Notes. Timelines are typical ranges for a mid-market, single-site implementation and will vary with scope, module count, and data complexity — actual duration is confirmed in Stage 2. HoosAI accelerates configuration, integration and data-mapping work under senior engineering review; it does not replace human review or client sign-off at any stage.