



The Exigo Migration Advantage: See How It Works

“

I think transitioning a legacy company like ours is not an easy job ... For Exigo to **grab all that data, scrub it, and run commissions and get it accurate, right from the very first one**, I think that was massive.

”

PRASAD GANKANDA
COO, Young Living



Introduction

A successful software migration is like building a complex bridge. It requires careful planning, deep engineering expertise, and constant communication between the architects and builders. A rushed or poorly managed project can result in a structure that fails under pressure, putting everything—and everyone—at risk. The skill is in the design, the trust is in the execution, and the urgency is in knowing that the project must be completed safely and on time.

Our proven implementation process removes the common missteps and risk of a software migration. We work in partnership with you, taking a structured and practical approach to get you running on a platform built for the future of direct selling. Our goal is a smooth, predictable, and successful transition that empowers your business and sets you up for long-term growth.

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Why Exigo Implementation Is Different

Exigo believes technology can be a distraction that prevents Direct Selling companies from focusing on their core business.

Our mission is to empower our customers to focus on the most important part of their business: their products and their people.

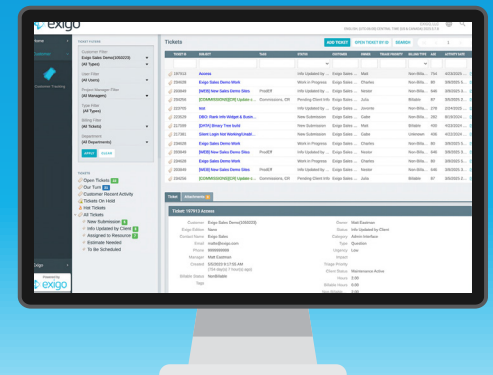
When it comes to migrating your business to a new software platform, nobody has done more migrations in the direct selling space than Exigo. We have a proven process that guarantees your implementation goes smoothly. Enterprise migrations are the trickiest, and we have done more of those than anyone. We have also migrated companies of all sizes and from every provider. Our unmatched experience is our biggest differentiator and the reason our process is so reliable.

“

We're a marketing company, so we should be out there selling oils and **let somebody else calculate commissions for us.**

”

MELISSA BISHOP
CFO, Young Living



Experience and Track Record

More than half of our implementation projects involve converting clients from another platform. We have moved companies from aging architecture, competitor systems, and complex homegrown solutions. Exigo is a trusted partner because we are used to taking on projects with a wide variety of scopes. We can plug into your business where it is most needed, from just commissions or back office to a full-stack solution. Our team has handled hundreds of implementations over the last decade.

Proven Methods and Best Practices

When you choose a software partner, you are making a significant investment. You need a process you can trust. Exigo's projects are reliable and predictable because:

- *We use tried-and-true best practices learned from years of experience and take the guesswork out of migration success.*
- *Our side-by-side testing for commissions and order calculations is a key part of our process.*
- *By comparing the data of both your old and new systems, we ensure everything is accurate and remove the risk from the migration process.*

Prioritizing Business Stability

Your business and your field's stability are your number one priority, and they're our primary goal. Just like an incorrect payroll run, a failed commission run can destabilize your field,

ruin trust, and a botched implementation can damage your business. We know what's most important to you, and we have a process designed to protect it.

Our process includes a **beta cycle** where we encourage you to involve your top field leaders. This gives them a chance to provide feedback and get familiar with the new system. When the field understand the changes, they become your advocates rather than your loudest critics, helping to ensure your business remains stable during and after the transition.

“

You honestly can take Exigo to a whole other level using the **items that already exist to create really scalable, solid platform products**. You don't have to reinvent the wheel.”

”

JANA GILMORE
Head of IT, pawTree

A Migration Process Focused on Your Business

Our process is designed to deliver tangible benefits by simplifying the path to a new, more powerful platform.



A Clear Path to Launch:

We provide a clear picture of the entire implementation process, from the initial sales handoff to your official go-live date. There are no surprises, just a straightforward plan. We work together to set a realistic go-live date and track progress to meet it.



Your Team Stays Focused:

Your team will be working with ours each step of the way and deeply involved in our process. We'll have weekly check-ins to make sure everything is on schedule and within scope. Our project managers are very proactive in managing risks and issues as well as coming up with creative solutions to unplanned bumps in the road.



A Solid Foundation:

We create your Exigo instance, complete with essential business information like your company details, logos, customer types, and warehouses. This gives you a solid foundation so you can begin testing and training on a live version of your system from day one.



A Confident Go-Live:

We believe the Exigo process is a safe and predictable option for your business. We perform thorough dry-run testing and hold a final "Go/-No-Go" meeting to give you confidence that everything is complete and outstanding. Our track record proves that we get our clients to the finish line on time, on budget, with all the features you need at Go-Live.



Seamless Handover:

After your go-live, we don't just disappear. We verify that everything is working as it should, from commission runs to payment processing to autoships. We do a handover to our professional services team to ensure a smooth "hypercare" transition to ongoing support and maintenance.

How It Works: Your Step-by-Step Guide

For a true insider's look at how we get you ready for launch, here is our step-by-step process:

1 Implementation Team Assignment:

After the Sales team hands the project off, the VP of Implementation holds a welcome call with your project sponsor and then assigns a team. This team has decades of experience from a leadership perspective, with the most junior person having three or four years and most people having seven-plus. Your team will include:

- A dedicated **Project Manager** who owns and runs the project with you.
- A **Business Analyst** who gathers requirements and performs quality assurance.
- A **Development Team** to build and iterate on the instance.
- A **Client Success Manager** who will stay with you after implementation and beyond.

2 Pre-Kickoff Tasks:

Your team completes internal tasks such as creating a project charter, a high-level timeline, and a web analysis. A project charter is a statement of the scope, objectives, and participants, outlining roles and responsibilities to keep the project on track.

3 Client Project Kickoff:

We meet with you and your key stakeholders to review the project charter, expectations, and best practices. We also collect all necessary client intake documents and key business information.

4 Implementation Team Tasks (Post-Kickoff):

We begin a series of tasks, including creating core tickets, scheduling training, and creating business requirements documents. We also send weekly project updates to keep all stakeholders informed.

5 Project Development:

Our development team begins work once the scope is approved. We establish key dates, such as the requirements cutoff and the last date for changes. The last date for changes is typically four weeks before go-live to allow two weeks for final hardening and training.

6 Project and Side-by-side Testing:

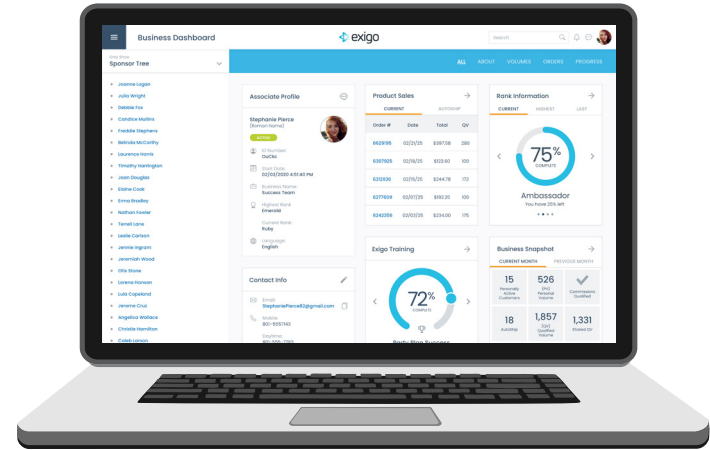
For conversion clients, we perform side-by-side testing with your existing platform. This is a critical step because it is the main hesitation when it comes to conversions. During this process:

- We run tests to verify that commissions, payouts, and other data are accurate when compared to your old system.
- We repeat this until you get the results you want, giving you the confidence that the transition will be smooth for both your corporate team and your field leaders.
- You then perform user acceptance testing (UAT) to approve the changes.

7 Go-Live Readiness:

We conduct a readiness assessment to review all remaining tasks, risks, and open issues.

- **Beta Cycle:** We strongly encourage a beta cycle with your top field leaders to expose them to the new back office and reports to elicit their feedback. We do this because if



When we looked at **Exigo**, it felt like it was something that we could scale up with and something where the technology seemed as innovative as we wanted to be as a company.



DERRICK RAYNES
Truvy

you don't involve them, they will be your loudest critics, but if you involve them, they become your advocates.

8 **Pre-Deploy Dry Run Testing:**

We perform a dry run to time the data pull, review, and loading process to develop a go-live timeline. This also helps us find and address any risks or issues before they become a problem on go-live day.

9 **Go/No-Go Meeting:**

We hold a meeting to review what is complete, what is outstanding, and any risks before the client approves the go-live date.

- If a **“Go”** is received, a detailed deployment plan is created with a timed, hour-by-hour timeline.
- If a **“No-Go”** is received, we outline clear action items to get you ready for another meeting.

10 **Code Freeze:**

Two weeks before go-live, we implement a code freeze. No new code changes are made unless they are business-critical and approved by all key stakeholders.

11 **Go-Live:**

On the scheduled date, the code is deployed to production. This is done on a go-live conference bridge so all stakeholders are on the same page. We monitor logs, APIs, and proactively monitoring throughout the process to quickly address any issues that arise.

12 **Post-Production Testing:**

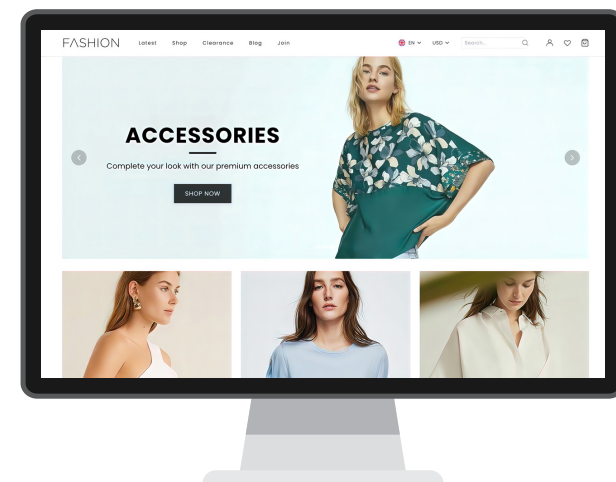
Our team and your team conduct end-to-end testing, and we verify your data. After a successful go-live, our implementation team remains on the project for a few months in a “hypercure” period. This provides assurance so you have the same team you worked with throughout the implementation to address any issues that arise.

13 **Post-launch Milestones:**

We guide you through checking commission runs, payouts, and autoships to ensure everything is working as expected.

14 **Transfer to Professional Services:**

Once all steps are complete, we transfer you to our professional services team. This includes finalizing all documentation and holding a knowledge transfer meeting to ensure a seamless transition. For clients who would like to build their own customizations, we can also provide SDKs for your internal teams to take on development themselves.



What to Look for in a Software Partner: A Checklist

We know that making a decision about who to build your software is one of the most important decisions you can make for your business. We believe Exigo is that partner, but as you weigh your options, use this checklist to ensure each software provider has a proven process for a smooth and successful migration.



A Proven Track Record:

A migration isn't just about the software. Ask for their migration success rate. Have they successfully handled 100s of complex, enterprise-level migrations, or are they only used to working with start-ups?



Team Experience:

Do they have a specialized team with years of experience in direct selling and migrations? Or is it a junior team learning as they go?



Flexibility and Scope:

Can they adapt to your business needs? Or do they require you to conform to their solution?



Thorough Testing:

Do they have a formal testing process that includes side-by-side testing to ensure data and development accuracy? A failed commission run can destabilize, or worse, damage your entire field.



Risk Mitigation:

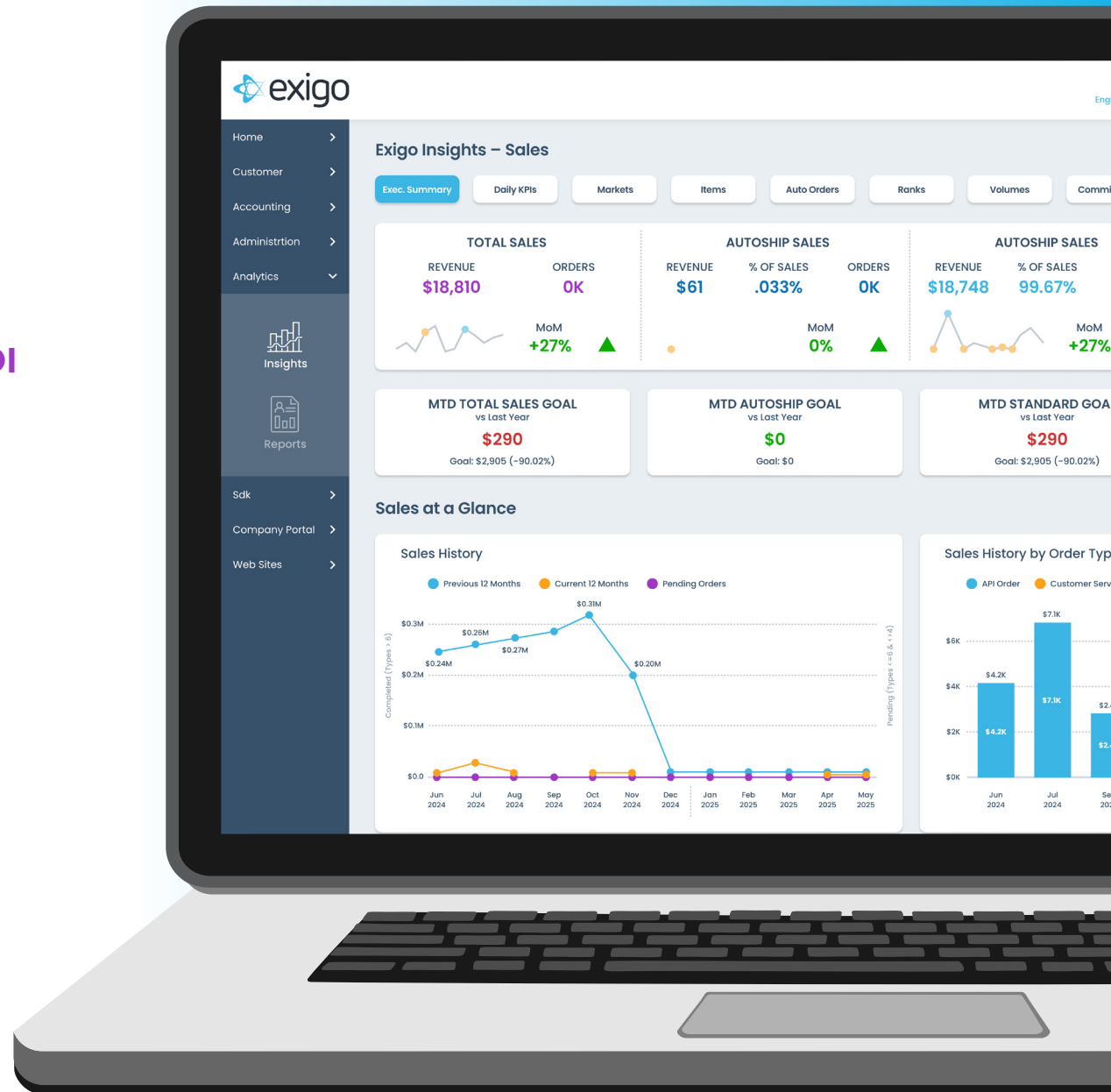
Do they provide a formal process to review and approve the go-live date with your key stakeholders? Do they have the experience of staying calm and when something needs to pivot to get you across the finish line? Do they have a plan for post-launch support and a clear transition to a dedicated support team?

“

From a straight ROI perspective, we're going to get a very strong ROI going with Exigo. There are no ifs, ands, or buts about it.

”

STEVE MCCARTHY
VP of Finance, Rodan + Fields



In Summary

Technology should be an enabler, not a burden. Our structured, reliable, and straightforward process ensures you can transition to a new platform with confidence. You get the benefit of a modern, powerful solution with the assurance of a successful migration.

Are you ready to see how a streamlined implementation can help your business thrive?

Talk to an Exigo sales representative to get the full technical details and a personal walkthrough of our process.

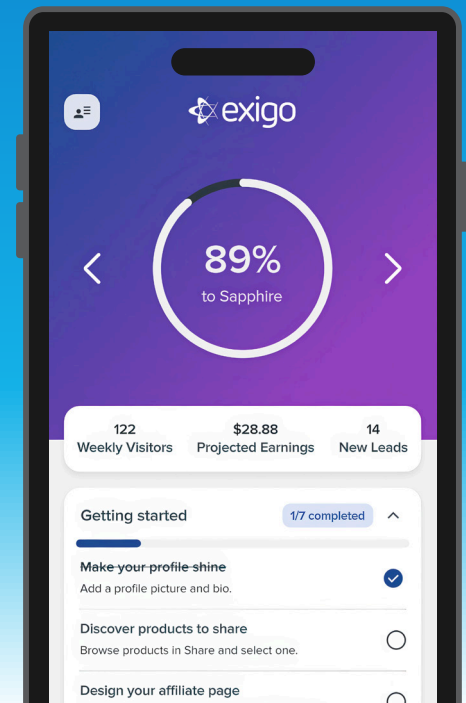
[BOOK A DEMO](#)

“

Experience Builder delivers the **tools to quickly launch promos and new markets** and to easily manage your e-commerce storefront.

”

JIM MARKS
SVP of Sales, Exigo



“

One of the best decisions we ever made was **partnering with Exigo** right from the start.

”

LAURA BRANDT
President, IDLife



Run, Know, and Grow your business with Exigo.

Contact us today at sales@Exigo.com
or scan the QR Code to schedule a free demo.