

Data Migration & Client Onboarding

ENVIRONMENT-TO-ENVIRONMENT DATA MIGRATION AT PLATFORM SCALE

Validation-first, selective, and fully reversible migration for faster client onboarding

SITUATION

As client volume grew, onboarding speed and reliability became a direct constraint on time to revenue and a rising load on central support teams. A leading global investment management platform provider serving institutional asset and wealth managers needed to accelerate client onboarding across development, QA, UAT and production environments. Each new client required extensive configuration before promotion to production. Existing tooling covered only part of the process, leaving manual steps that were error-prone, dependent on a central support team, and difficult to validate before execution. Errors surfaced late in the cycle, slowing onboarding and increasing delivery risk.

APPROACH

Ionixx designed and built a controlled data migration tool for environment-to-environment promotion. Before data moved, the tool compared entities across source and target environments and highlighted every difference. It generated pre-migration validation reports for client review and approval, supported selective import of approved entities only, and provided full rollback if issues were identified late in the process. Ionixx integrated the tool into the standard onboarding workflow across development, QA, UAT and production. The result was a repeatable, auditable migration process that replaced manual promotion steps with validation-first execution.

OUTCOME

The solution reduced manual migration errors by approximately 90 percent. Data consistency in target environments improved from around 85 percent to above 90 percent. Client onboarding time improved by 30 to 40 percent, accelerating time to revenue and reducing dependency on central support teams.