

Case Study

Myth busting: Legacy plan migrations don’t have to take years

When a critical benefits renewal deadline moved up unexpectedly, one team had no margin for error.

See how a WEX partner accelerated a complex health plan migration by a full month.

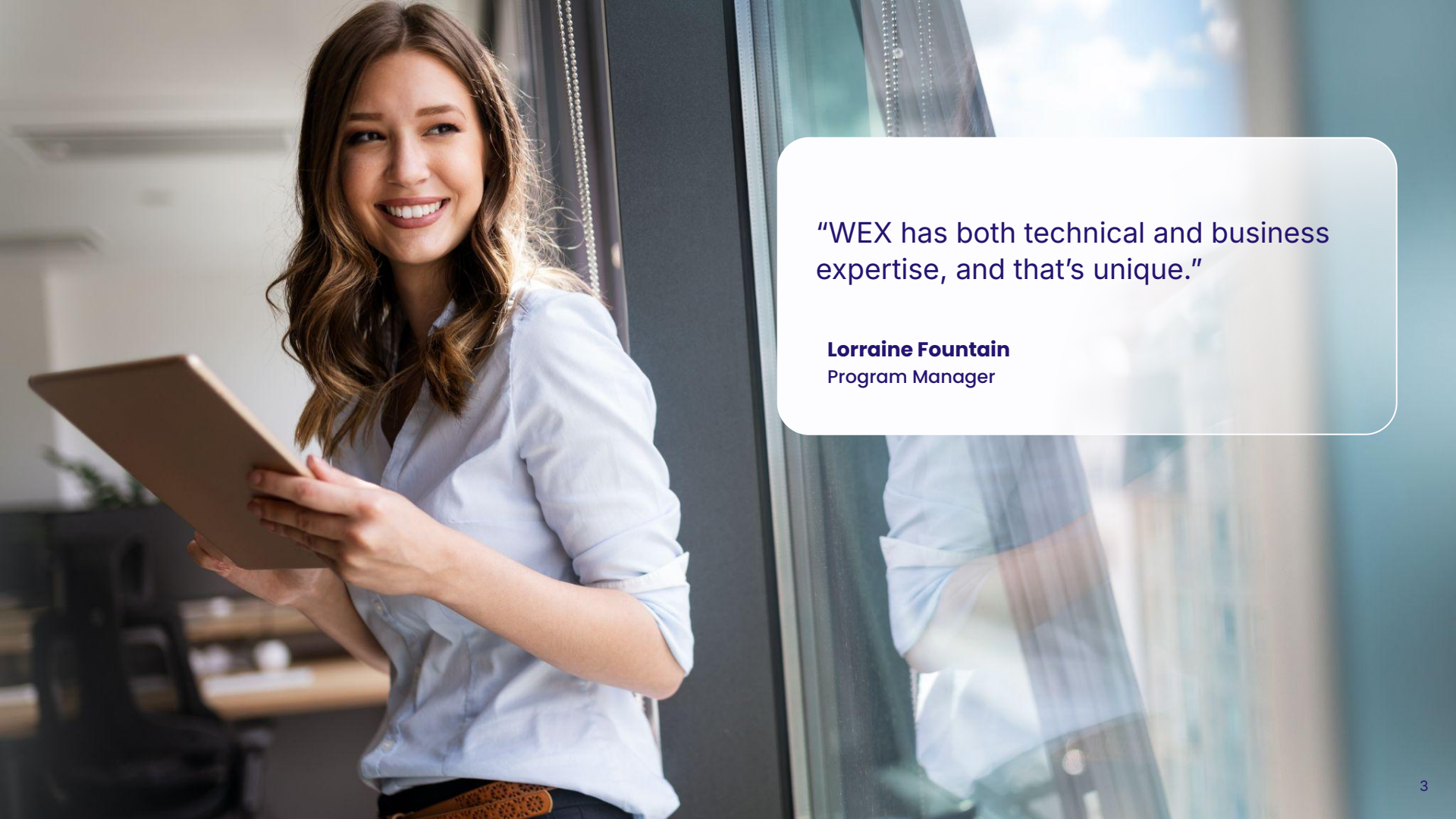
Lifetime Benefit Solutions

The reality: Moving a month early, with zero disruption

Lifetime Benefit Solutions (LBS) faced a critical challenge: migrating 200 employers from an outdated legacy platform to WEX to support a major health plan renewal portal launch.

The initial delivery timeline was already aggressive, but the stakes increased when the September 1st deadline was unexpectedly moved up by a full month. The migration had to be completed in time to power automated renewal communications. Any delay would have meant missed or late renewals, employer confusion, and manual workarounds during a critical enrollment period.

Lorraine Fountain, Program Manager at LBS, noted that this shift spiked her team’s anxiety. But with the WEX team's support, she felt confident. “Everyone was there since the beginning, everyone understood the context, and everyone made valuable contributions to the process."



“WEX has both technical and business expertise, and that’s unique.”

Lorraine Fountain
Program Manager

The strategy: Putting agility into action

- **Dual-expertise resources:** WEX provided consultants with both technical scripting skills and deep business logic expertise — a "unique" advantage noted by Lorraine Fountain.
- **Phased migration:** A two-phased approach with dedicated user acceptance testing (UAT) enabled thorough testing before the final production load.
- **Proactive scorecarding:** Iterative scorecarding identified errors early, significantly reducing data correction needs in the final stages.

A closer look at WEX scorecarding

In accelerated migrations, late-stage surprises are often the biggest risk. Our scorecarding process is designed to eliminate those surprises before they can impact go-live timelines.

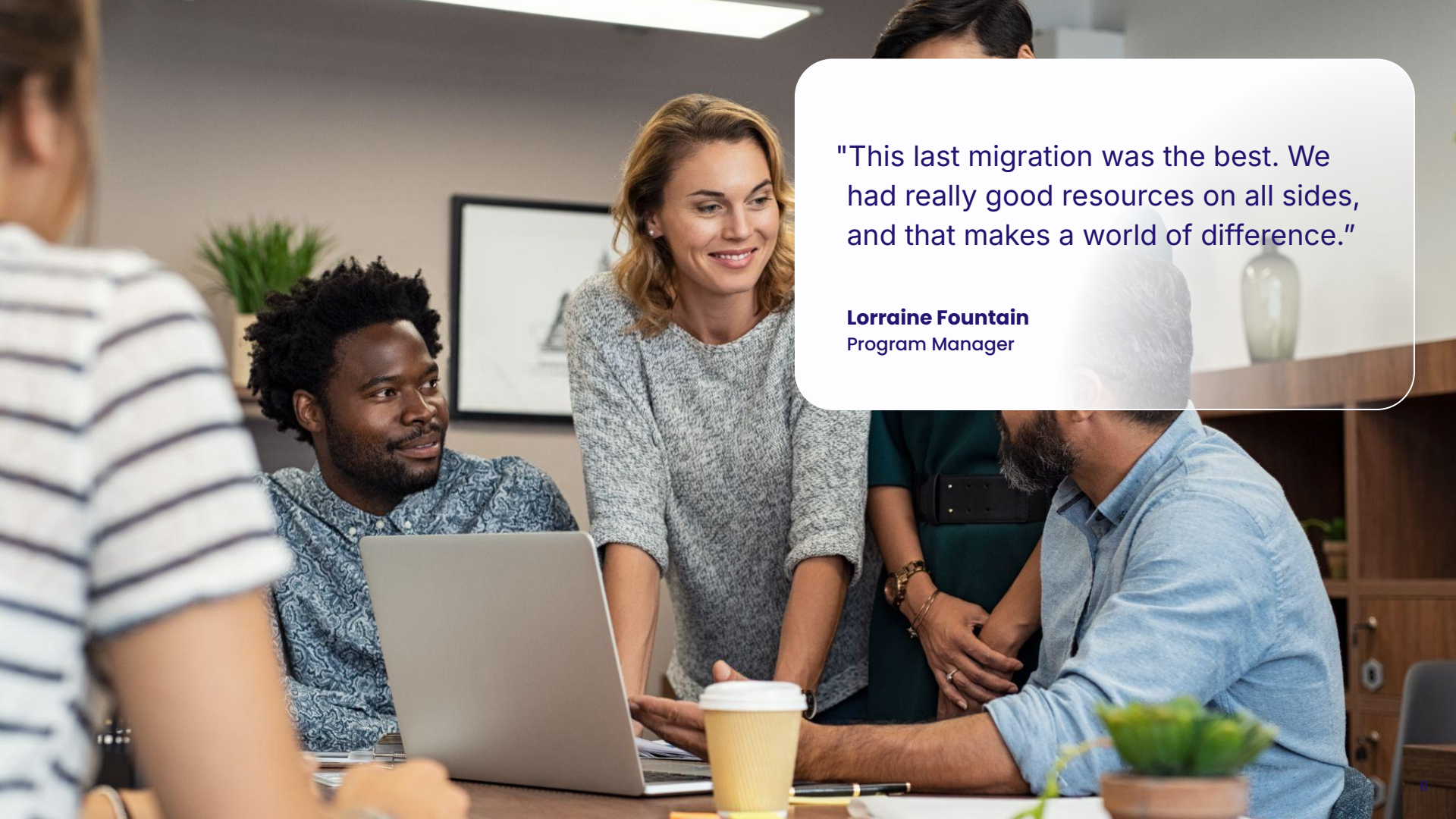
Before loading data into a live platform, WEX uses a dedicated scorecarding environment to validate the data. This process identifies:

- **Data inconsistencies:** Highlighting where source data doesn't align with WEX platform requirements.
- **Transformation errors:** Determining if the logic used to convert existing data to WEX templates needs adjustment.
- **Code corrections:** Identifying if specific scripts or platform configurations require updates to accept the unique data set.

A "green" scorecard, meaning zero critical errors, is mandatory before any data can proceed to the UAT or production load.

Real-world impact

Thanks to the scorecarding process, the LBS project achieved green status and moved to production in just one day.



"This last migration was the best. We had really good resources on all sides, and that makes a world of difference."

Lorraine Fountain
Program Manager

The proof: 30 days ahead of schedule

1
Month ahead

Completed the full migration a month earlier than originally planned to meet the new business requirement.

200
Employers live

Successfully moved all 200 employers to the LBS platform before the September 1st deadline.

0
Disruptions

All renewal emails were triggered and delivered on time, without errors.

The lasting effect: A promising path forward

This is the third successful migration Lifetime Benefit Solutions has completed with WEX, and the smooth results have given the LBS team total confidence that future migrations will succeed too.

With the proven scorecarding process and a team of migration experts, WEX provides the peace of mind LBS needs to handle complex changes with ease.

"WEX gained our confidence upfront and, quite frankly, it just increased as we progressed."

Lorraine Fountain
Program Manager

Don't let the multi-year myth slow your growth

Legacy migrations don't have to create chaos for your teams or uncertainty for your employers.

Keep your migrations smooth and your project teams calm. The accelerated transition you need is waiting with WEX.

wex

Learn more