

# The Serialization Migration Playbook

HOW PHARMA MANUFACTURERS  
CAN SWITCH WITHOUT DISRUPTION



# Switching Doesn't Have to Be Painful

The biggest barrier to switching serialization platforms isn't cost or features—it's the fear of creating a bigger nightmare than the one you're already living with. We get it. You've heard the horror stories: months of downtime, data corruption, failed validations, and compliance gaps that cost millions.

But here's what those stories don't tell you: **they happened because companies tried to wing it without a proven methodology.**

This playbook reveals the exact framework our migration experts have used for successful platform switches. Every strategy, timeline, and contingency plan has been battle-tested by pharmaceutical manufacturers just like you—companies that were tired of legacy limitations but terrified of making things worse.

Most of our migrations were completed in 4-6 weeks with zero business disruption. By the end of this playbook, you'll know exactly how.

**How to Use This Playbook:**  
Each "play" in this guide represents a proven strategy that eliminates guesswork and reduces risk. Follow the sequence, use the checkboxes to track progress, and reference the real-world examples to see how other companies navigated the same challenges you're facing.

# Play #1: Assess Your Readiness

## Before You Make Any Moves

Smart migrations start with honest assessments. This isn't about convincing yourself to switch—it's about understanding whether you're positioned for success.

**Score 1 point for every 'yes' answer.**

### Current System Pain Points

- Are you experiencing frequent bugs or system downtime?
- Are validation efforts (IOQ) time-consuming or costly with your current provider?
- Do you rely on expensive third-party support for compliance or integration?
- Are you facing issues with data errors, quarantines, or order cancellations?

### Cost Transparency & Predictability

- Are there hidden or escalating costs with your current serialization solution?
- Are you paying extra for serial numbers or new connections?
- Is your total cost of ownership (TCO) higher than expected?

# Play #1: Assess Your Readiness

## Before You Make Any Moves

### Compliance Confidence

- Are you confident your current provider supports regulations to enter new markets?

### Strategic Fit

- Do you want more control and visibility across your supply chain?
- Would you benefit from fixed pricing, GS1 standards, and a long-term partner?

### Internal Readiness

- Do you have internal agreement that a switch is needed?
- Is your provider contract up for renewal in the next 6–12 months?

# Play #1: Assess Your Readiness

## Before You Make Any Moves

Your Readiness Score: \_\_/12

### Scoring:

- **10-12:** You're more than ready to switch
- **7-9:** Good candidate to switch
- **4-6:** Mixed signals, do a deeper evaluation first
- **Below 4:** Stay put for now (revisit in 6 months)



# Play #2: Strategic Planning

## No Guesswork, Just Results

This is where most migrations fail—they skip the strategy and jump straight to data extraction. Our approach frontloads all the complexity so execution becomes simple.



### Discovery & Mapping

- **Complete packaging line inventory:** Document every line, location, and production scenario
- **Map partner integrations:** Identify all CMOs, 3PLs, and regulatory connections
- **Document system architecture:** Understand current data flows and integration points
- **Assess regulatory requirements by region:** Plan for DSCSA, FMD, Russia, and emerging markets
- **Create migration priority matrix:** Rank systems by business criticality and complexity



### Planning & Validation Preparation

- **Develop detailed migration timeline:** Account production schedules and blackout dates
- **Plan validation approach:** Define IOQ requirements and acceptance criteria
- **Identify potential data quality issues:** Review historical data for gaps or inconsistencies
- **Set up project communication protocols:** Define roles, meeting cadence, and escalation procedures
- **Create rollback plan:** Document exactly how to revert if something goes wrong

**What You Do:** Review the strategy, prioritize business-critical regions or partners, provide access to current systems

**What OPTEL Does:** Lead all technical assessments, create detailed project plans, manage vendor coordination

# Play #3: Data Extraction & Transformation

## While You Stay Operational

This is the technical heavy lifting that keeps most companies stuck with their current vendors. But when you have a proven framework and experienced team, it becomes routine. Here's how we handle your most valuable asset—your data.



### Secure Data Extraction

- Export all historical data:** Extract historical EPCIS transactions plus all master data
- Map custom fields and extensions:** Identify proprietary data structures that need conversion
- Handle inactive GTINs:** Preserve historical product references even if no longer active
- Set up secure data transfer:** Use SOC 2 Type II compliant encryption and transfer protocols
- Create data reference tables:** Document exactly what data maps to which export files



### Data Transformation & Quality

- Convert to GS1-compliant EPCIS format:** Standardize all data to industry format
- Transform custom events:** Convert proprietary event types to standard equivalents
- Cleanse data and remove duplicates:** Handle issues that accumulated over years
- Process large files efficiently:** Use specialized tools to handle massive data volumes
- Validate data integrity:** Run checks to ensure no data loss during transformation

**What You Do:** Provide data access credentials, confirm mapping logic

**What OPTEL Does:** Manage technical extraction, run data quality checks, coordinate with your current provider

**Data Security:** Encrypted transfers and SOC 2 Type II certification

**Real Example:** "Despite the data volume (nearly 5 years of serialization data), the entire processing phase was completed within a week, with no major issues encountered. Custom TraceLink data structures were mapped to industry-standard EPCIS format."

# Play #3: Data Extraction & Transformation

## While You Stay Operational

### Handling the Unexpected

During one recent migration, legacy aggregation files were discovered to be incomplete. Instead of leaving the customer with bad data, OPTEL worked directly with their manufacturing partner to obtain accurate EPCIS files and correct the historical data. Problem solved proactively.

# Play #4: Validation & Testing

## Full Confidence, Zero Risk

This phase eliminates migration risk without adding delays. Most companies either skip testing (dangerous) or over-test (expensive). Our approach validates everything that matters while keeping you on schedule.



### Testing & Data Validation

- **Run mock data loads and integrity checks:** Safely test the full data import process
- **Validate partner connections:** Ensure all CMOs, 3PLs, and regulators receive your data
- **Test real-time exception handling:** Verify alerts and notifications work as expected
- **Validate dashboard and reporting:** Confirm you can access all critical business intelligence
- **Run parallel and side-by-side testing:** Compare old and new system outputs to verify accuracy



### Validation Documentation & Compliance

- **Complete IOQ support:** Full Installation and Operational Qualification (at no extra cost)
- **Generate data integrity reports:** Formal documentation proving no data loss or corruption
- **Document all validation results:** Create audit trail for regulatory inspections
- **Obtain stakeholder sign-offs:** Get formal approval from IT, Quality, and Operations
- **Prepare go-live authorization:** Final approval documentation for production cutover

**What You Do:** Review test results, participate in validation sign-offs, approve go-live timing

**What OPTEL Does:** Execute all testing protocols, provide dedicated validation support, create validation documentation

# Play #5: Go-Live & Scale

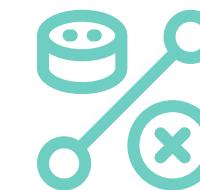
## Seamlessly, Confidently

This is the moment of truth—but when you've followed the playbook, it's actually the easiest part. Here's how we ensure your go-live goes unnoticed (which is exactly what we want).



### Go-Live Execution

- **Execute go-live and cutover:** Execute direct or parallel switch with zero downtime
- **Monitor systems in real time:** Track data flows and partner connections during transition
- **Verify partner and regulatory connectivity:** Ensure CMOs, 3PLs, and compliance submissions work immediately
- **Test exception handling in live environment:** Verify alerts and error handling work under real conditions
- **Confirm user access and training:** Ensure all team members can access and use the new system



### Legacy System Decommissioning

- **Archive historical data as required:** Preserve data for regulatory compliance and audits
- **Safely decommission old platform:** Proper shutdown procedures to avoid data loss
- **Cancel old vendor contracts:** Handle contract termination and final billing
- **Redirect support requests:** Update team contacts and escalation procedures
- **Document lessons learned:** Capture insights for future deployments or rollouts

# Play #5: Go-Live & Scale

## Seamlessly, Confidently

This is the moment of truth—but when you've followed the playbook, it's actually the easiest part. Here's how we ensure your go-live is boring (which is exactly what you want).



### Scale & Future Planning

- **Optimize system performance:** Fine-tune configurations based on actual usage patterns
- **Plan future deployment rollouts:** Use successful migration as template for additional sites
- **Set up ongoing monitoring protocols:** Establish routine health checks and maintenance schedules
- **Schedule regular system reviews:** Plan quarterly reviews to optimize and expand capabilities

**What You Do:** Monitor business operations, approve final cutover timing, plan future expansions

**What OPTEL Does:** Manage technical cutover, provide go-live support, ensure smooth transition

**Go-Live Reality:** Most customers experience zero business disruption. Production continues normally while systems switch behind the scenes.

# Play #6: Risk Management

## What If Something Goes Wrong?

Professional migrations plan for problems before they happen. Here's how we address every major risk that keeps executives hesitant to switch:

### The Big 5 Migration Fears

**Fear:** "We don't have time or resources for a major migration"

**Reality:** OPTEL handles the migration end-to-end. Your team's involvement is limited to reviews, approvals, and providing access.

**Fear:** "We can't afford any downtime. Production can't stop"

**Reality:** Our parallel rollout approach means zero production disruption. Old and new systems run simultaneously until cutover is verified. Your revenue stays protected.

**Fear:** "L4 validation is too complex and expensive"

**Reality:** OPTEL includes full validation support (IOQ) with every migration at no extra cost. No consultants, no surprise bills, no delays.

**Fear:** "What if the migration disrupts our operations?"

**Reality:** We've refined the process to eliminate operational impact.

**Fear:** "What if our data is incomplete or corrupted?"

**Reality:** We've handled every data scenario imaginable. When legacy data issues surface, we work proactively to fix them (like when we worked with a customer's manufacturing partner to correct years of bad aggregation data).

### Rollback & Recovery Plan

- Complete data backup procedures
- Documented rollback steps
- Emergency support protocols
- Partner notification procedures
- Business continuity plans

### The OPTEL Safety Net

- SOC 2 Type II certified security
- 24/7 support coverage
- Dedicated migration team assigned to your project
- Proven methodology
- No vendor lock-in

# Safely Migrate to VerifyBrand™ by OPTEL

- **Average timeline:** 4-6 weeks from start to finish
- **Business disruption:** Zero downtime
- **Data integrity:** 100% data preservation with full validation



# Why Pharma Manufacturers Choose OPTEL



## Transparent, Predictable Pricing

- Fixed-cost investment with no hidden fees
- No additional charges for serial numbers
- Most competitive pricing structure in the market



## Reduced Validation Burden

- Full platform validation included
- Easy URS authoring for integrations
- Ongoing validation support



## Flexible, Future-Ready Platform

- Modular design
- Quick integration
- Automatic updates to meet new regulatory requirements



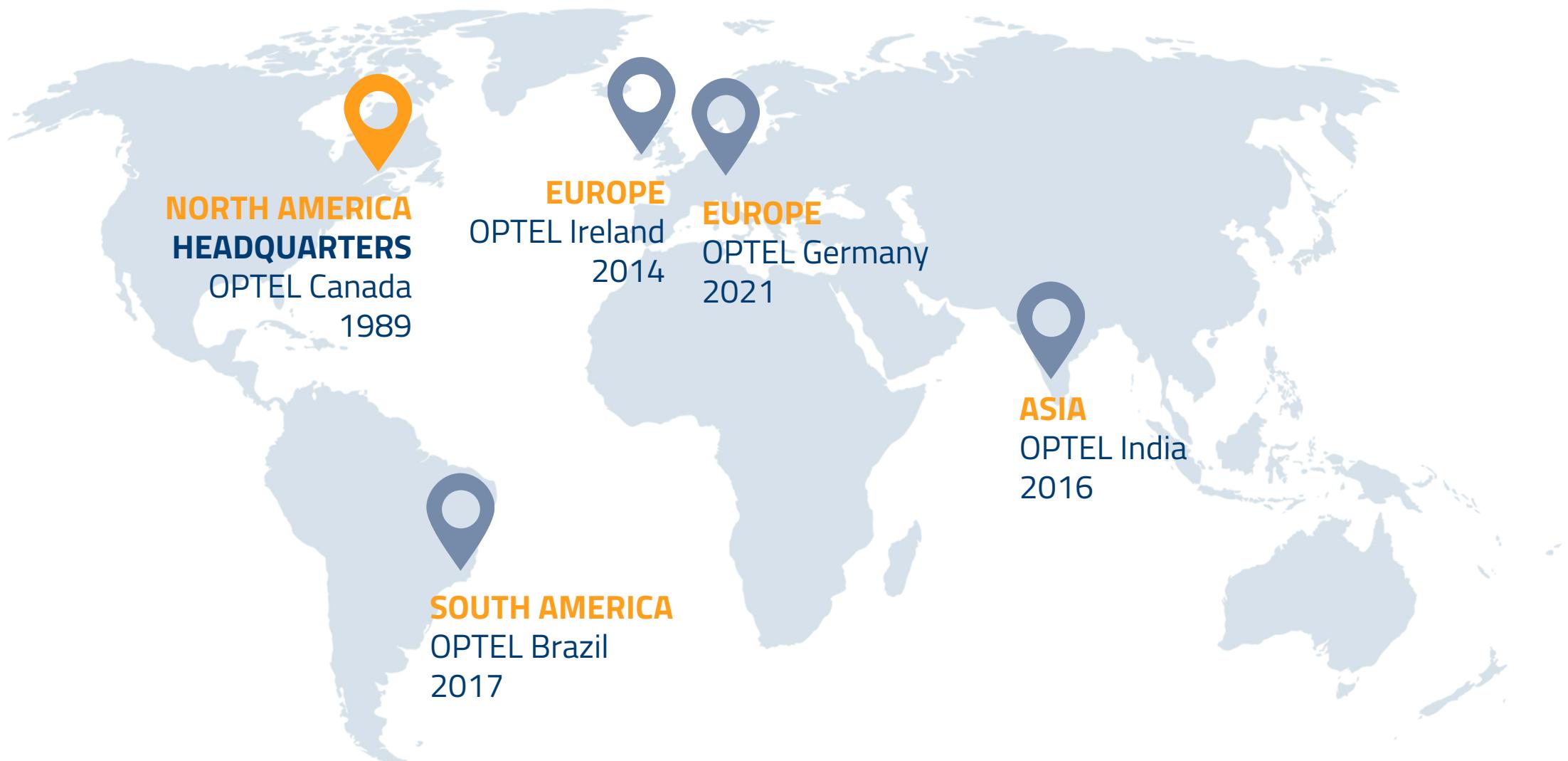
## Built-in Intelligence

- Advanced reporting tools for regulatory compliance
- Real-time supply chain health monitoring
- Contextual data insights for better decision-making

# They come for the software. They stay for the service.



# Global Expertise, Local Support



35+

**YEARS OF EXPERTISE**  
in traceability and vision  
systems



Presence in more than  
**30 COUNTRIES**

6,000+

**SYSTEMS INSTALLED**  
worldwide



24/7 international  
**TECH SUPPORT**

# Ready to Migrate?

Connect with our migration experts to get a custom timeline and save up to \$100K per year in serialization.

[Connect with us online](#)

Or contact us by phone:

**Canada Headquarters:** + 1 418 688-0334

**Brazil:** + 55 19 31132570

**India:** +91 832 669 9600

*You're not the first to switch,  
you're the next to succeed*

