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Mitigating risk in large-scale financial data migration

Planit's structured risk-based test strategy for Resimac

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Supporting Resimac's portfolio acquisition

Resimac Group Ltd is one of Australia's leading non-bank lenders, serving over 155,000 customers and managing a home loan and asset finance portfolio of more than $15.7 billion. In October 2024, Resimac announced the acquisition of a major auto finance and novated leasing portfolio, bringing in an additional $1.5 billion in loans and approximately 100,000 new customers. Resimac partnered with Planit to manage the testing of a high-volume, business-critical data migration, to ensure this expansion was executed with confidence and minimal risk.

Key Outcomes:

Seamless migration of $1.5 billion in financial data

Early identification and resolution of **high-risk** data issues

Scalable automation to accelerate regression cycles

Real-time dashboards and reporting for stakeholder visibility

Confidence in post-migration **data integrity**

Navigating the complexity of financial data migration

The migration involved highly complex and interdependent financial data. Resimac needed to safeguard the accuracy, completeness, and consistency of this data as it moved into their infrastructure. Complex transformation logic, multi-table relationships, and inconsistent or null values posed risks to data validation, reporting, and downstream business processes. The critical nature of the data demanded precise, repeatable test cycles. On top of that, coordinating multiple teams and synchronising test environments across the migration lifecycle added further operational pressure.

Planit's risk-based and collaborative testing approach

Planit was engaged for its deep expertise in risk-based testing and its strong track record in financial services. With extensive experience in validating large-scale, high-volume data transformations and multi-layered system dependencies, our team brought a level of assurance critical to the success of this high-stakes migration.

From the outset, Planit implemented a tailored, methodical, and collaborative test strategy that was embedded across all phases of the project lifecycle. This approach was designed not only to align with Resimac's business objectives but also to address the technical intricacies and data sensitivities inherent in migrating a $1.5 billion financial book. High-impact areas were identified and prioritised early, allowing the team to focus resources where they were most needed and mitigate key risks before they could escalate.

To meet the demands of repetitive, high-precision testing cycles, automation was introduced to accelerate regression testing and ensure consistent coverage across multiple iterations. The automated framework helped maintain both speed and quality, particularly as new data formats, transformation rules, and interdependencies were validated throughout the process.

Clear governance was a cornerstone of the approach. Our team established structured reporting mechanisms, delivered transparent metrics through real-time dashboards, and enabled continuous defect tracking. This gave stakeholders confidence in the migration's progress and empowered decision-making based on live, accurate insights.

Throughout the engagement, we maintained close collaboration with both Resimac and third-party vendors. By aligning on data structures, transformation logic, and delivery timelines, our team ensured seamless coordination across all parties. This end-to-end alignment was key to managing environment synchronisation and ensuring readiness at each stage of the migration.

Driving data integrity and operational confidence

Planit's involvement was instrumental in delivering a secure, accurate, and timely migration of Resimac's newly acquired financial portfolio. The result was a smooth transition that enabled Resimac to onboard 100,000 new customers and fully integrate the loan book with confidence.

As **Janet Hu, Test Manager at Resimac Group**, shared:

"Planit's delivery of testing services has been outstanding. Their expertise, cost-effectiveness, and excellent communication have greatly contributed to the success of our project."

This partnership ensured Resimac could realise the full value of its acquisition, securely, efficiently, and with complete trust in the data.

Key outcomes

- Seamless migration of $1.5 billion in financial data
- Early identification and resolution of high-risk data issues
- Scalable automation to accelerate regression cycles
- Real-time dashboards and reporting for stakeholder visibility
- Confidence in post-migration data integrity

Key technologies

- Custom automation frameworks
- Risk-based test design methodologies
- Data validation and reconciliation tools

Key services

Test Management

Test Automation Implementation

Software Development Testing

Performance Testing

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At Planit, we are experts in quality engineering and assurance. We bring extensive domain expertise and targeted solutions to meet the specific challenges faced across the spectrum of technology-intensive industries. We can provide you with the right skills and advice to deliver quality quicker for your digital projects and core system transformations.

Contact us to find out how we can accelerate growth for your business.