

Seven Ways to Make Your Upgrade Easier

Upgrades can be difficult and risky. But, as famed speaker Earl Nightingale once said, “You can measure opportunity with the same yardstick that measures the risk involved.”

And upgrading your software solution delivers plenty of opportunity, including new features and functionality, a better user experience and often, the tools you requested based on current version needs.

Knowing that upgrades are vital to realizing the return on your technology investment, there are steps you can take to reap the benefits of upgrading while mitigating the risk.

1. Communicate, communicate, communicate

A smooth upgrade begins when everyone knows it is coming. Make sure both business and technical stakeholders understand why the organization is choosing to upgrade and give them a voice in the process. They will provide you with valuable insight, as well as guidance and assistance, with the upgrade process.

2. Get a lay of the land

Understanding where you are will help you understand where you are going. Your communication with stakeholders and end users should help you get a lay of the land so that you better understand the scope of your project. You'll know who will be involved in the upgrade, what your hardware and network requirements are, and what your overall needs will be. From here, you can determine which upgrade path works best for you.

3. Choose your upgrade path

There are two ways to upgrade your ECM software solution. The traditional way is faster, but carries more risk. The incremental parallel upgrade is slower, but provides less risk and greater flexibility. A traditional upgrade path usually takes less time because the IT staff replaces the older version with the newer release all at once. The all-at-once method carries more risk, however. If the solution is up and running afterward, you're up and running. If there's an issue, it could create downtime until the issue is resolved. In an incremental parallel upgrade, you're replacing the solution in a phased approach. Doing so reduces both the number of potential issues and their scope. It also allows for both incremental end-user training and step-by-step switching from old release to new release.

4. Know your slow time

Regardless of the upgrade option you choose, schedule your upgrade during your organization's slow time. If you're in manufacturing, maybe that's during a planned plant shut-down. If you're an educational institution, that might be during summer hours. Whenever it is, you lower your risk by upgrading during a time when the organization is least reliant on your software solution.

5. Don't forget third-party integrations

If your solution integrates with third-party software, such as Epic, SAP, Banner, Esri and so forth, make sure you find out if there are plans to upgrade these to newer versions, as well. If so, make sure your upgraded solution is compatible with those newer third-party versions.

6. Test, test and test again

Having a test system as part of your upgrade strategy provides you with a:

- Mirror of your production system where you can test your upgrade process
- Place to make modifications to scripts without affecting production
- Development platform for additional modules
- Place to conduct user acceptance testing prior to go-live on a process or a new module

7. Know you're supported

Take some time to understand how your software vendor will help you through the upgrade. From documentation that walks you through the process step-by-step, to expert advice during the upgrade, or by engaging an Upgrade Services group, your vendor should be at your side during any upgrade process.