Upgrading your technology solutions can seem like a daunting task, but doing so is vital to realizing the return on your investments. Regular software upgrades ensure that your organization benefits from new features, functionality and a better user experience. So how can you reap the full benefits of upgrading while mitigating business risk?

Here are seven ways to ensure an effortless, pain-free upgrade.

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.

2. Get the lay of the land

Get a better understanding of your software needs by communicating with your stakeholders and end users. Getting the lay of the land helps you determine what needs to be upgraded, the scope of the project, and which upgrade path is best.

3. Choose your upgrade path

There are two ways to upgrade your content management solution:

- **Traditional upgrade**
  - For an all-inclusive method that makes it easy to move up to the newest release.
  - Faster, but carries more risk.

- **Incremental parallel upgrade**
  - A phased approach reduces potential issues and allows for greater flexibility, but requires more time.
  - Slower, but provides less risk and greater flexibility.

4. Know your slow time

Lower your risk by upgrading during your organization’s slow time.

5. Don’t forget third-party integrations

If your solution integrates with third-party software, find out if there are plans to update these to newer versions — and make sure they are compatible with your upgrade.

6. Test, test, and test again

Having a test system as part of your upgrade strategy is a must.

- Mirror your production system to test your process.
- Develop additional modules with little risk.
- Conduct user acceptance testing prior to go-live on a process or a new module.

7. Utilize vendor support

Your software vendor can help you with the upgrade. From detailed online resources to expert guidance on-site, Hyland offers support throughout the process.

Hyland Upgrade Services

Our Upgrade Services team is here to assist you every step of the way during the upgrade process. Contact your account manager or visit us at Hyland.com/Services.