

Metastorm BPM® Upgrade Assessment



Unlock the Value of Your Implementation

As you upgrade your Metastorm BPM implementation, there are many questions to consider. For instance, what kind of resources will it require? What software, hardware and infrastructure changes might be needed? Is there a chance that it will disrupt the flow of information or business? An Upgrade Assessment from Metastorm will answer these questions and many others.

Structured planning ahead of an upgrade project provides important input and supports the eventual success of the upgrade. The Metastorm Professional Services team is well equipped to lead your company through this process. In addition to the valuable experience of our consultants and the worldwide technical team supporting them, Metastorm will use a set of well-designed and integrated discovery and evaluation processes to help unlock additional value from your existing Metastorm BPM implementation. It will provide you with a proven approach to guide the upcoming upgrade project.

Metastorm's Upgrade Assessment is a "deep dive" into your BPM system. While following a proven outline of checklists, the assessment will accommodate your industry by tailoring a plan specifically for your BPM needs.

The Upgrade Assessment is more than just a technical estimate. By determining the baseline for your company along with the ideal future solution, Metastorm can point the way for how you can best leverage the strength of BPM for your business needs going forward. Our comprehensive appraisal will include the following steps:

- Groundwork – Information gathering can include any number of interviews and meetings as necessary, along with written checklists to filter the initial needs. A project kickoff meeting would identify stakeholders, schedule executive support, and establish major timelines, project duration and the business process scope. Any assumptions or constraints are formally recognized and the project sign-off cements the arrangement.
- Measurement – This commences the intensive look at your BPM environment, followed by a thorough analysis of all considerations, technical and otherwise. After understanding the current conditions, gaps are identified along with future

Highlights

Benefits

- Plan your upgrade with precision
- Receive expert help from the company that understands change management challenges unique to BPM
- Determine benefits of new features and functionality
- Have an understanding of the scope, cost and timeline the upgrade will require
- Identify and measure resources necessary for a seamless transition
- Remove potential roadblocks before they are encountered
- Minimize disruption and risk, and determine user readiness
- Feel confident with a customized upgrade strategy
- Focus on your business while we plan and document the steps

growth needs. Success factors are determined along with reasonable objectives.

- Potential – It's important for you to understand the opportunities afforded by your imminent upgrade. Through demonstrations, reviews and open discussions it is our goal that you are properly equipped to determine and prioritize your requirements for any updated BPM releases. Our upgrade specialists will meet with any target groups and appropriate leaders to discover user adoption considerations and to lay out the post-upgrade expectations.
- Strategy – We will establish and present the most effective ways to perform your upgrade. All of the logistics and technical factors will be outlined for each upgrade path. For each option, crucial factors and timeline changes are defined. Any potential user and process effects will be listed and all options along with their respective benefits and challenges will be described.
- Proposal – A full Upgrade Assessment report will be presented and will include a project chart, resource requirements, detailed estimate, and infrastructure and migration plans to carry out the complete upgrade. Crucial upgrade milestones are specified along with any remaining project risks and how they will be mitigated.

Proven Implementation Methodology

The Metastorm Rapid Delivery Framework (RDF) is a robust and adaptable approach to rapidly deploying your BPM and Integration initiatives. Developed and continuously enhanced by the industry experts of the Metastorm Professional Services team, the best practice delivery methodologies of the Metastorm RDF help you increase speed to value and establish a solid foundation for on-going process and system improvements by fully leveraging the depth of capabilities and flexibility offered in the Metastorm BPM and Metastorm Integration Manager software solutions.

With a strong customer focus and emphasis on collaboration, the Metastorm RDF helps ensure your implementation is easily understood and embraced. The five phases of the Metastorm RDF include:

- **Engagement** – project discovery and initiation
- **Collaboration** – communication of requirements, initial prototyping
- **Definition** – detailed solution and architecture design, enhancement of prototype to convert to development model
- **Construction** – enhancement of development model to convert to complete application, project team testing
- **Transition** – customer QA and user acceptance testing, deployment activities



Throughout the entire engagement, you maintain full project visibility and participation, allowing checkpoints and milestones to be easily tracked and measured by everyone involved. The Metastorm RDF approach to implementation perfectly complements the Metastorm Enterprise portfolio of solutions, enables the transfer of knowledge and skills to your team, and helps you achieve a rapid and successful solution roll-out that delivers immediate results.

Why Metastorm?

Metastorm and our integrated support network have the experience and resources necessary for successful planning, enterprise integration, customization, project management, technical support and education to help you get the most out of your Metastorm BPM and Metastorm Integration Manager investment. We offer the right combination of the industry's top people and solutions to help you meet your business objectives. Metastorm Professional Services deliver:

- Expert consultants who understand BPM and integration strategy, technology and business process challenges in your industry
- Proficient trainers experienced in knowledge transfer
- Superior customer support for immediate response and results
- Diverse partner access to complement the Metastorm team

Metastorm is committed to your success and to building a long-lasting relationship that helps you realize a strong return from your investment – both now and into the future. Let our Professional Services team help you take full advantage of Metastorm technology by analyzing your business and system processes, identifying issues, and transforming them into efficient Metastorm processes.

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