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Seven Strategies for Successful Upgrades



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Software upgrades have a bad reputation. Dreaded by IT professionals, line of business owners and end users alike, upgrades traditionally meant time, money and hassle for everyone involved. As a result, upgrades were often delayed or avoided altogether. This practice may have prevented short-term headaches but also kept customers from leveraging the latest and greatest version of their products.

Happily, organizations no longer have to choose between time-consuming upgrades and cutting-edge technology. These seven strategies combine best practices with practical how-tos to ensure that your upgrade process runs smoothly and successfully.

1. Don't Get Left Behind

Everyone knows they should upgrade, but it can seem like more trouble than it's worth. Spoiler alert—it's not. Technology now moves so quickly that not having the newest version of your chosen toolset can be a serious disadvantage. You can't afford to fall behind over something as simple as an upgrade.

Assure your team or leadership that moving forward with an upgrade is the best strategy by clearly communicating the consequences if you don't. These include:

- Competitive disadvantage
- Loss of productivity
- Compatibility and integration challenges with other technology
- Security implications
- Compromised maintenance and/or support
- Lower ROI
- Hindered innovation

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2. Consider ROI

When you neglect to upgrade your software, you essentially leave money on the table. Your investment includes not only the technical capabilities available when you purchased the product, but all of the R&D that follows. While some upgrades involve additional cost, many don't. Timely upgrades ensure that you run a better product for your initial expenditure, improving your ROI both quantitatively and qualitatively.

3. Stay Safe

Technology vendors upgrade software for many reasons, including new features, a better user experience and compatibility updates. While these value-adds may seem optional, security is not. Malware and hackers evolve as fast, if not faster, than their well-meaning counterparts, and upgrades include the most up-to-date protection against threats. Without the latest version of your software, you're not guaranteed that your organization is protected.

Don't assume that you're covered because you have other safeguards in place. A well-tuned firewall and anti-virus programs are great, but they don't make up for a security hole or a targeted attack. Upgrades may include "shiny objects" that appear less than critical, but even the smallest security patch can make the process worth it.

4. Sweat the Small Stuff

Security patches aren't the only minor updates that make a major difference. Upgrades are typically focused on big-ticket items that substantially improve your product but also include numerous patches that are crucial to your operation. These performance upgrades, bug fixes and security enhancements aren't flashy, but they can make a huge difference in the day-to-day use of the tool.

Make sure to research the full extent of the upgrade before deciding when to move forward. Even if the major changes don't seem relevant to your business, the minor updates may be the real reason to kick off the process.

5. Get Organized

Once you decide to upgrade, it's important to start from a clean slate. That doesn't mean compromising your customizations, but it does require some prep work and a thorough assessment. Start by reviewing and verifying your current environment. Depending on what solution you're upgrading, this may include:

- Architecture
- Customizations
- Integrations
- System specs
- Hardware sizing requirements
- Server operating system version
- Environment variables
- Databases
- Workflows

Document your current state in a repeatable format to ensure that you have a baseline for this and any future upgrades. This ensures that everyone involved in the process has a 360 degree view into the environment and enabling them to identify potential risks and opportunities to improve your implementation.

6. Make a Plan

It sounds obvious, but a solid strategy is key to a successful upgrade. With your documentation in place, map out who needs to do what and when they need to do it. Upgrades are often derailed by surprises born from miscommunication or fractured teamwork. Your plan should include concrete steps for:

- Evaluating readiness
- Deploying the new architecture
- Transitioning integrations
- Deploying the production environment
- Performing the data migration
- Driving solution adoption

Circulate your strategy among all relevant stakeholders so that each involved party knows what's involved. By setting expectations and communicating clearly, you will greatly increase the chances of a positive result.



Services and support teams have joined forces to give you more options for completing upgrades

7. Enlist the Experts

Every upgrade is unique. Some are easily handled in-house with the right resources, while others require external support. As you complete your assessment and build your strategy, consider your options for assistance.

The traditional enterprise upgrade model often relies on an external services team which provides deep expertise throughout the upgrade process. This is a great choice for more complex upgrades. While some organizations or projects may not require this level of service, if you plan to run an upgrade internally, make sure you have the right resources at hand. Ask your vendor about services that provide the information and support you need without a full services team engagement.

Upgrade Services from CA Technologies

At CA Technologies, we're dedicated to ensuring you get the most from your software investment. That's why our services and support teams have joined forces to give you more options for completing upgrades. From a full services engagement to the self-service tools you need to succeed in-house, we're here to help.

When you work with our team to scope your upgrade project, we'll help you craft a strategy that makes sense for your environment, team, timeline and budget. You choose whether to execute that strategy internally or to hand off the heavy lifting to the CA Services team.

Advantages of working with CA Services on your upgrade include:

- Speedier solution configuration and deployment
- Lower risk of upgrade surprises
- Reduced modifications when appropriate
- Improved administration and upgradeability
- Reduced loss of workforce productivity
- Accelerated time-to-value to get up and running quickly

CA Support complements our services team, working together to help ensure your success. No matter what your level of services engagement, CA Support is accessible 24/7. That means that for every upgrade, for every product, you have access to CA Support's resources from upgrade start to finish, plus an extra 30 days to close out all remaining support issues.

Choose to enlist a designated support engineer to help throughout your upgrade project, or leverage our extensive self-service options, including:

- Knowledge base articles with how-tos and troubleshooting tips for upgrades
- Community forums staffed by CA experts and grown by your peers
- Beta programs so you can try new versions before upgrading
- Download center for the latest patches and bug fixes

Our deep research library and extensive self-service tools are always online and ready to help. Whether you need to speak with a person, now, or find the latest documentation and downloads, we've got you covered.

Software upgrades don't have to be a headache. With CA Technologies, you get upgrade support your way, with more resources, options and expertise to guarantee that you don't get left behind.

CA Services is committed to your success, from managing the technology solutions you have now to helping you manage the technology decisions for your future. We lead with experience from thousands of engagements to deliver business value quickly, help you navigate complex business and technology challenges, and provide exceptional support throughout the entire solution lifecycle. Our experience is your advantage, with best practices that enable organizations to plan, manage, develop and secure complex IT environments. CA Services provides the unsurpassed expertise you demand to select, implement and run your enterprise IT solutions with confidence.



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