

Enterprise Migration Planning

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Migration Overview

- Not simple
- Not straightforward
- Care and preparation required
- Same prep for one or multiple apps
- Circumstance, complexity of enterprise, nature of business are play a part

Expected Migration Paths

- Estimated 60%-75% will go through application selection
- Estimated 20%-35% will migrate current application
- Estimated 5% will stay

What Are The Choices?

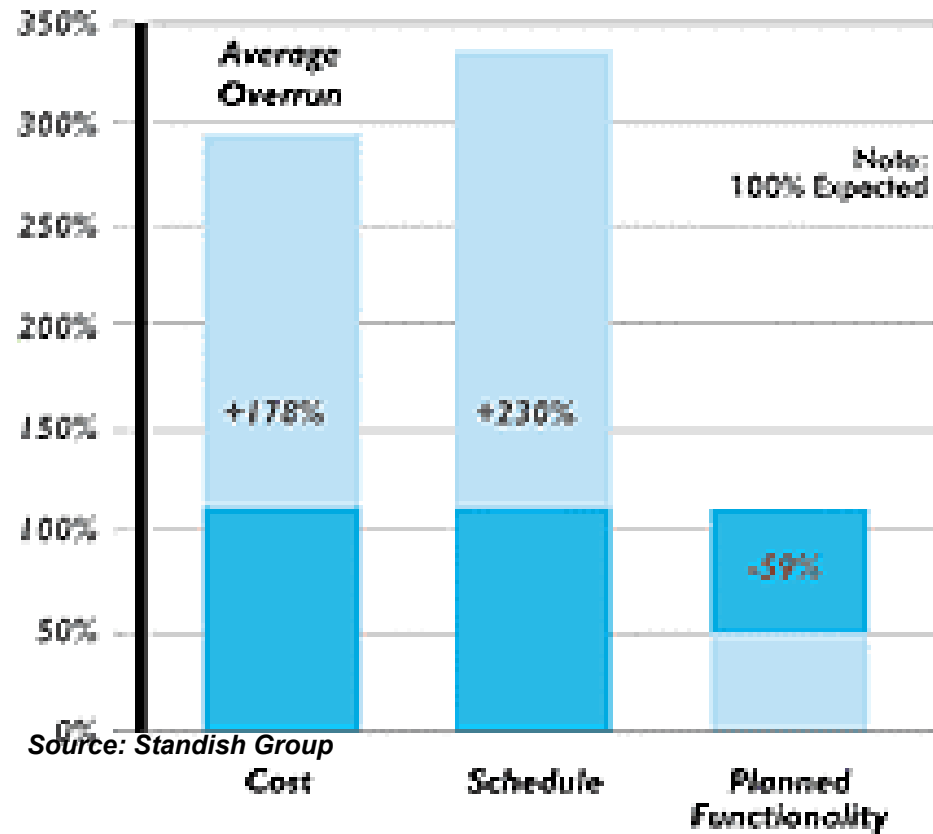
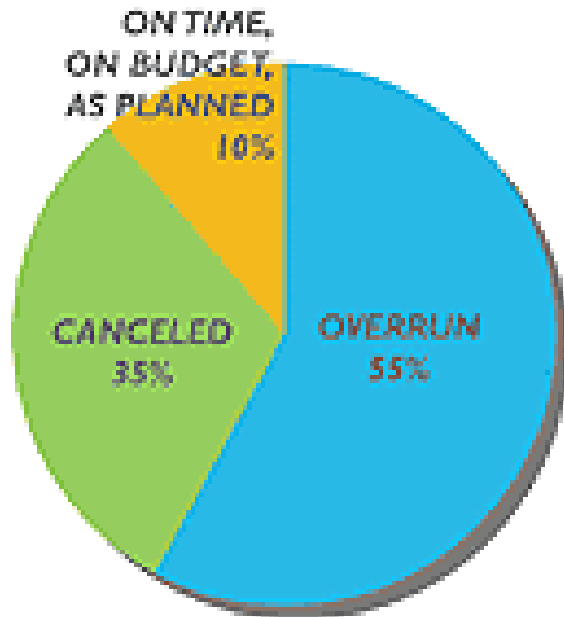
- Depends on Business needs
- Depends on Application Support
- Depends on Hardware, Software Support
- Depends on where you are
 - Geographically
 - Communications Infrastructure
- Staffing
- Legal

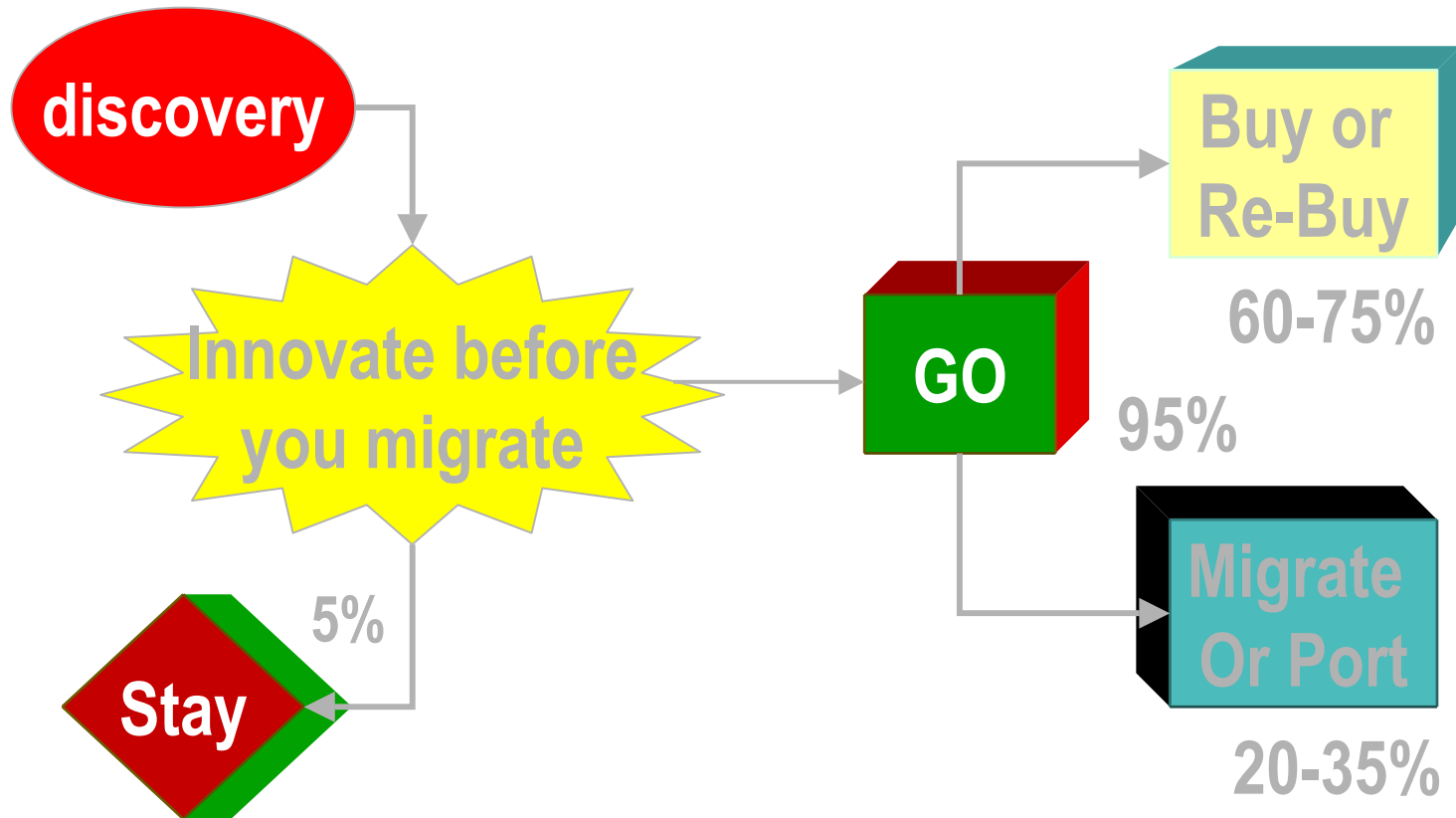
Migration Business Challenges

- How do you keep your business flying while changing engines in mid-air?
- How to keep servicing your customers?
- How do you keep innovating?
- What will you need to ward off competition?
- How will this impact staffing?
- What about knowledge transfer?
- How will this be funded? ROI?

The Full Cost of Replacement

ERP Implementation Results





Innovate
before
you migrate

Projects that effect
operational efficiency
and ROI

Projects that build
skills and experience

Projects that will help
with year over year
comparisons in future

Your Risk Profile

- What responsibility does your organization have to customers, shareholders, government?
- Can you/will you be able to support the application, software and hardware beyond Dec 31, 2006?
- What is the cost profile for staying?
- Will the application need to evolve?

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Decision Framework

- Who is your trusted advisor?
- What are the business needs and plans?
 - What is the business & technology baseline
 - What are the business & technology targets
- Application
 - What is used now?
 - What are the alternatives?

Decision Framework (cont'd)

- Information Architecture
 - How is data captured, flowed, accessed, stored, and managed?
 - What is the data architecture?
- Technology Architecture
 - What kind of infrastructure is currently in place?
 - Networks, Servers, Clients, etc.
 - Does it support the current applications?
 - Will you need to upgrade your infrastructure?



Migration Technology Challenges

- Database
- Language/Compilers
- Business Logic
- APIs/Interfaces
- Documentation
- Presentation/User Interface
- ISO9000/FDA re-certification
- Licensing

Stages of Migration

- High Level Overview
- On-site Executive Overview
- On-site Evaluation
- Migration Plan
- Delivery
- Implementation

High Level Overview

- Identify
 - Business objectives
 - Other objectives
- Develop action plan
- Gauging corporate readiness for migration

On-Site Executive Overview

- Identify
 - Awareness of complexity and expected outcomes
 - Level of risk company can take
 - Strategic direction for business and technology
 - Corporate level of commitment
- Determine
 - Migration Budget
 - Migration time frame
 - Completeness of migration plans

On-Site Migration Evaluation

- Business Baseline
- Technology Baseline
- IT Skills Inventory
- Business Target
- Technology Target

Business Baseline

- What are the business functions?
- Applications use by which departments?
- Does the application match the needs of today of the future?
- Are there expected changes required?
- Are there industry standard packages?

Technology Baseline

- Was the application bought/home grown?
- What is/are the language(s) of the application?
- Do you have the source code for each application?
Where?
- What data storage is used?
- Are there any scripts?

... Technology Baseline

- Where is the documentation?
- How would you test the software if a new version was written or delivered?
- Are there any interfaces?
- Is there a standard way of documenting /packaging application?

IT Skills Inventory

- What
 - does your staff know?
 - kind of IT architecture skills?
 - have they learned on their own?
 - training are they currently taking?
 - platforms can your team support?
 - does your IT team want to know?

Business Target

- What does the future business plan look like?
- What business will you be in?
- How will the business process and the resultant workflow change?
- What new application functionality will be required?
- Will the current applications support the future business plan?

Technology Target

- What is the environment in which the new applications will reside?
- Open Systems?
 - Unix? NT? Linux?
- Database? Relational? Eloquent?
- Integrated Applications?
- Development and Test environments?
 - IDE

Migration Plan

- Migration plan for each application being moved
 - Separate into projects
 - Basic project management and more
- Project management includes
 - Tasks required
 - Responsibility
 - Dependencies
 - Duration
 - Schedule including milestones and status points

... Migration Plan

- Procurement of infrastructure
- User Interface plan
- Database and files plan
- Back up and recovery plan
- Users, Operations and Programmers training
- Documentation Plan

... Migration Plan

- Data Migration Plan including
 - Data Blueprint
 - What to migrate?
 - What should not be migrated?
 - How to handle history
 - First load
 - Cleaning data
 - Summaries

Delivery

- Different for each organization
- Based on previously developed plans
- Testing plan developed
- Implementation and cutover plan

Implementation

- Certify production environment
 - All systems, applications and data
 - All external system interfaces
- Testing completed successfully
- End-user training
- Project sign-off



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