

Keeping Up With The Cloud

5 ways to stay current and competitive

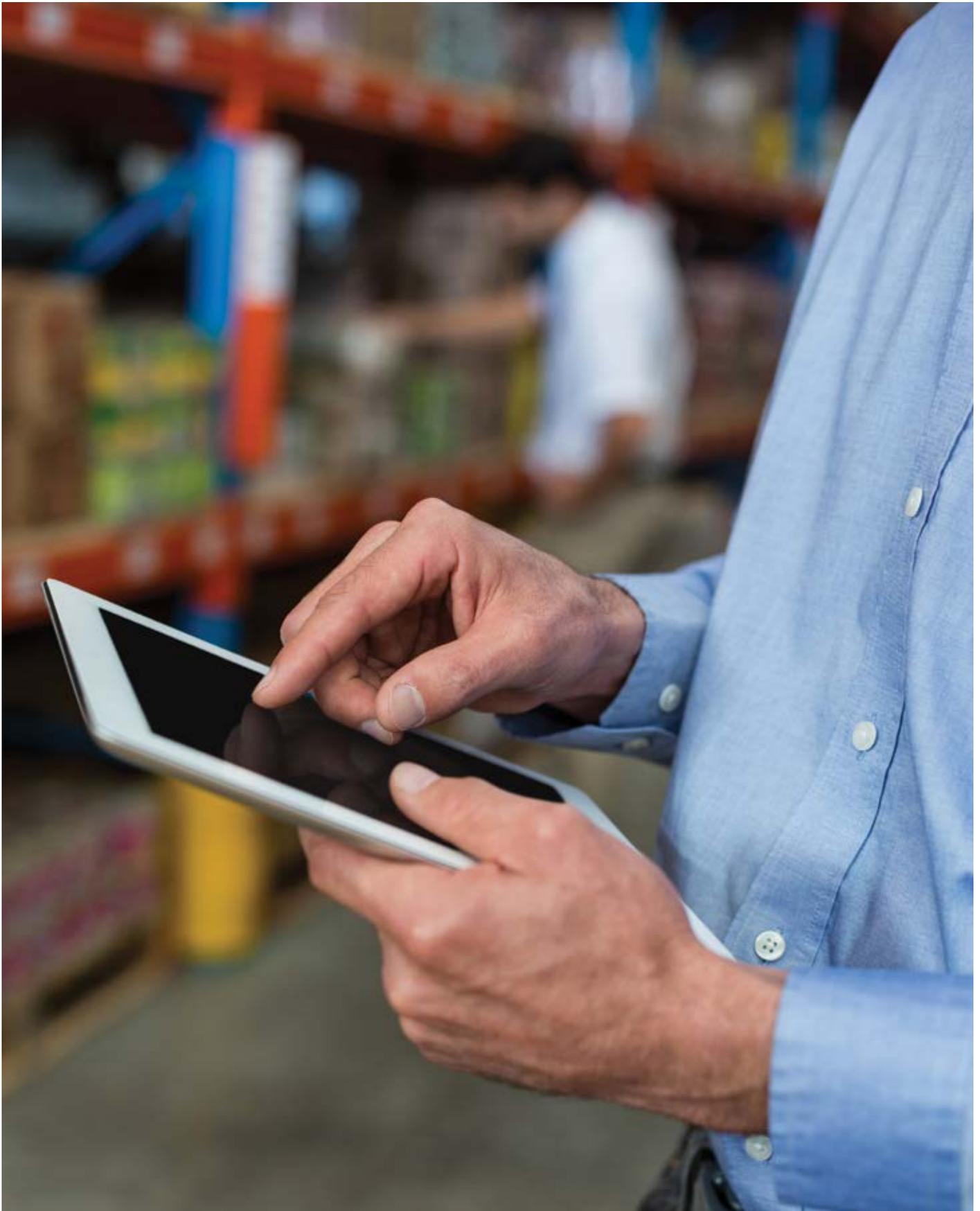


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Keeping Up in a Cloud-Driven World

Business leaders who choose to deploy technology solutions on premises in an increasingly cloud-trending world have several reasons for their decision. Many choose to keep their system on premises because they are inexperienced with and wary of cloud-based software. Others are concerned they have insufficient resources to move to a cloud solution because their existing system is full of customizations that will complicate migration processes. Some prefer on premises because they feel it better supports regulatory requirements such as ITAR or FDA compliance. Regardless of why your business has chosen on premises over cloud-based, your choice doesn't have to limit your ability to compete with the companies whose capabilities are elevated by the cloud.

While it's true that companies with cloud-deployed solutions have minimized their effort required to run their business on—and take advantage of—the latest technology, smart leaders using on premises software are weaving the same “stay current” mentality into the cultural fiber of their organizations. Those businesses that consider software a once-a-decade investment of time and effort will struggle to compete with those that have the strategies, processes, and technology in place to adapt more quickly.

Whether you're hoping to move to the cloud in the near future or not, this white paper can help you maximize your on premises deployment by applying the best practices cloud companies are using to outperform businesses that don't have the agility that latest technology delivers. Read on to learn five steps you can take to integrate their “stay current” mindset to enhance security, prepare for the future, and keep up with technology-driven competitors.



1. Ongoing Upgrade Strategy

Your business will be better positioned to adapt and grow if you abandon the mindset that software is a major investment you need to make only every few years to fix bugs and eliminate workarounds you've built up over time. Instead, incorporate a regular upgrade strategy into the core of your business plans—it's easier to keep pace than catch up. Each time you delay or abstain from a new software release, you delay the inevitable—eventually you will need to upgrade your technology. When you adopt a strategy and build a culture focused on staying current by planning and budgeting to implement each release as they become available, your organization benefits from efficiency and productivity improvements while reducing its exposure to security and downtime risks due to outdated technology. Your employees will be better able to adapt to these smaller incremental changes, so upgrades will become less disruptive to your business. Instead of expending significant funds and efforts for large leaps, take updates in stride.

How Epicor® supports your strategy

Epicor is committed to being your longtime technology partner and delivering innovative tools to your business on a regular basis. We have developed a predictable release cadence alongside a software support lifecycle policy that communicates our development and support plans with our customers, so you can establish an ongoing strategy and budget to stay current on your most vital technology investment.

2. Building a Culture of Staying Current

To stay current, you need to build a culture among your employees that embraces change. Doing so requires removing obstacles and lifting up “change agents”—innovative thinkers that propel growth and drive new initiatives. These business leaders are essential to creating an open, adaptive environment within your organization.

Establish an upgrade team

It's important to build a cross-functional team of stakeholders that will execute each upgrade. As each new release becomes available, assemble the team and assign the responsibilities for the upgrade. This team should include business stakeholders, not just IT staff.

“Identify individuals that embrace the change.”

—Frank Halloway | Wipaire, Inc.

For example, your team may consist of one or two members of IT, plus members from finance, procurement, manufacturing, service, and sales. Depending on the business, some members may have multiple roles. All members need to understand how the new release will affect them and the employees in their department. It is also critical that the members are themselves change agents who have time to dedicate to the process so they are not impeding it.

3. Building Customizations for Upgradability

Epicor delivers industry-driven solutions that reduce and in some cases eliminate the need for customizations. Epicor also offers flexible platforms that are easily tailored to meet business demands. Those that choose

to customize, find the most difficult part of upgrading is maintaining customizations from release to release. This becomes especially difficult the longer the release has been in production and the more hands that have built modifications. Customizations could include report and forms modifications, new reports, screen changes, new fields, integrations, source code changes, and workflow. Frankly, many businesses don't know what has been modified. Identifying customizations is the first step to upgrading successfully, and it makes sense to categorize and document customizations. Some critical data points you should note for ongoing upgrades include:

1. Stakeholder of the customization—the person or department that requested the customization. This is needed for validation that the customization has been successfully upgraded.
2. Purpose of the customization—what is the business value? Who or what is affected by the customization?
3. Criticality of the customization—is this a high-, medium-, or low-priority customization? In other words, could the business run for three to five days without the customization?
4. Who built the customization—it is oftentimes easier to update one's work than assign to someone else. Also, you may need outside expertise in the upgrade.
5. Technology used in the customization—tools change, so it may make sense to uplift the tooling.
6. Usage of the customization—how often is the report run or the customization executed?

Evaluating customizations is an ongoing process that comes to light at the time of upgrade—especially since new functionality can often eliminate the need for a customization, or new technology may make it easier to deploy. Also, abandoned customizations can be identified and eliminated. This is a critical step in the upgrade process and one that has ongoing benefits. Upgrading all business customizations once they are written can be expensive and create delays in the process.

Moving customizations to technology stacks that offer greater upgradability reduces the ongoing costs of upgrading. Bringing forward customizations in their old technology framework can cause problems. Your technology vendor can advise what customizations are easily incorporated during upgrades and which ones could bring added complexity and cost to the process.

4. Validating Your Software Release

Validation of the new release is a key step in the upgrade process. Ensuring the software continues to perform as expected across the business processes is sometimes done lightly, outsourced to IT, or not done at all. The risk of finding problems after the go-live of a new release is dependent on the care given to this critical step.

For businesses with a team of stakeholders, the effort in validation can

be shared based on known discipline. Some businesses with IT may look to them to perform the majority of the validation or to perform a first-pass validation before turning a release over to test by the individual departments.

Reconcile key reports to confirm data is clean in the new release. Running these reports before data is upgraded and after the upgrade and comparing the two is a time-critical step and an opportunity for error and pain if something is missed. Take care to ensure the data matches the pre-converted data.

Third-party vendors can be leveraged to automate the building and maintaining of validation scripts. If the business has significant processes that need validation for each release, it may make sense to explore the options in the marketplace that work with the Epicor environment.

5. Investing in Employee Adoption

Greater employee adoption ensures the greatest benefit of new releases to the business. Intuitive application features have a part to play, but adequate training is also critical for employees. Training all affected employees on new functionality and changes in workflow will inherently strengthen value.

How Epicor supports employee adoption Epicor University (EU)

Epicor University provides learning tools, content, and training opportunities that enable you to achieve your business goals. The suite of tools available offer

comprehensive training options that align to the different learning styles and needs of your employees, from in-depth training for new users to quick answers to on-the-job questions.

In Summary

The evolution of business management or ERP systems—from being a system of record to a critical business platform—means that businesses today need to leverage the latest capabilities to outperform their competitors.

Businesses that have chosen cloud deployment have set new standards for the pace of technology and adaptability when experiencing significant growth. Having an ongoing software upgrade program as part of the business framework ensures your business can keep up, and is a critical step to being able to consider cloud in your future.

The good news is that the choice is in your hands. By implementing the practices described here, your business can more easily migrate to the cloud in the future with fewer technical complications and greater employee buy-in.

As your software partner, Epicor continues to invest in technology that matches the requirements of business. To learn more about the solutions referenced here—including cloud—or to get in touch with our dedicated upgrade team, contact your Epicor customer account manager or visit epicor.com.

Business Benefits of Epicor Cloud Solutions



Award-winning cloud solutions that are uniquely industry fit, so you can consume innovation with ease, unleashing new power to drive growth.



Stay current with the pace of innovation



Attain world-class security



Simplify your business for alignment and scale



Empower your IT organization to support strategic initiatives that drive business growth



Go live sooner for faster time-to-value



Be mobile, go global, and get collaborative



Lower your environmental impact

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit www.epicor.com.

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