

Survive Your Workload Automation Conversion

How to Switch to a Modern
WLA or SOAP Solution —
Without Losing Sleep



stonebranch



**Switching WLA providers
can be a complex and
time-consuming process.**

**You can avoid disruption
by understanding potential
pitfalls, putting the right
methodologies in place, and
working with a seasoned
team of conversion experts.**

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Introduction

The Power of Workload Automation in Modern IT Environments

Workload automation (WLA) is the practice of using software to schedule and manage tasks related to IT operations, as well as business processes and transactions. WLA can help improve enterprise-wide performance, reduce costs, and increase compliance.

Because this kind of automation is foundational to every aspect of today's organizations, WLA tools are deeply ingrained in the company's IT infrastructure.

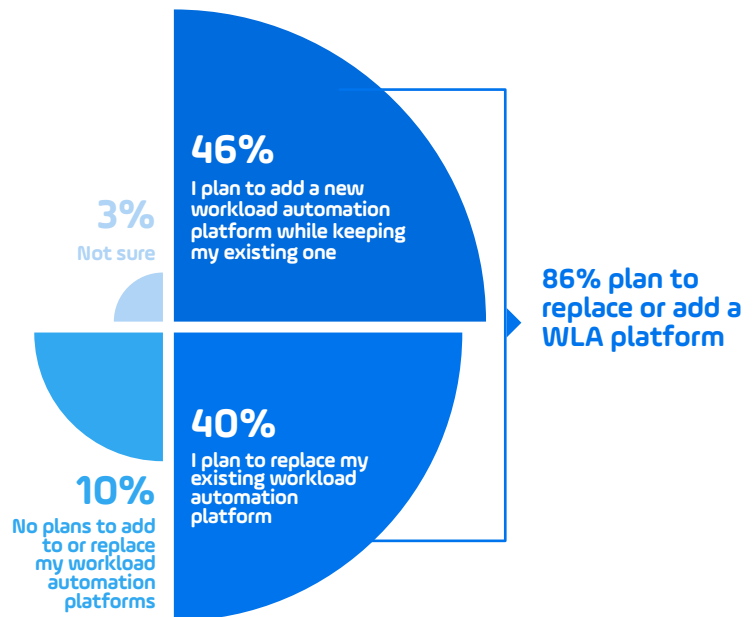
So, how do you address the potential challenges of converting to a modern WLA platform? Is it possible to minimize risk and maximize the benefits inherent in a more modern solution?

Simply put, the answer is yes.

Why Would You Ever Need to Change WLA Providers?

According to the [Global State of IT Automation report](#), 86% of IT professionals plan to replace or add a new WLA platform in the next year. They're almost equally driven by three primary motivations:

- Need a more modern, agile WLA solution.** For these respondents, their current WLA tool is unable to meet the needs of their organization. The top three features they're looking for – self-service capabilities, inbuilt analytics, and a modern interface – are all about making automation more accessible, easier to analyze, and simpler to use for IT and business users alike.
- Need a more cost-effective WLA solution.** Whether driven by budget restrictions, heavy incumbent provider price increases, or adjustments to their licensing standards, IT pros are always looking for ways to reduce costs. For some, this can mean switching to a SaaS (software as a service) or cloud-based solution.
- Need better customer service.** A reliable software provider is essential for technical support and expert advice. Having dependable access to customer service resources enhances user experience and ensures smooth operations.



Respondents also indicated that they need a WLA tool that can orchestrate on-premises and cloud-based applications, integrate container management platforms, and automate cloud infrastructure. These findings align with Gartner's latest [Market Guide for Service Orchestration and Automation Platforms](#), which indicates that traditional WLA tools are insufficient to handle the increasing complexity of various workload types, volumes, and locations.



Ultimately, today's enterprises require an automation and orchestration solution that's capable of growing and supporting their business for years to come. If that doesn't sound like your current vendor, it's time to explore your options.

Understanding the WLA Conversion Process

A WLA conversion, at its core, is comprised of a two-step process: transition and validation.



Transition is where your data is extracted in some digital format from the legacy system, then submitted to a tool that interprets the data and generates the output in the format of the target system. However, due to differences in system structures, the conversion isn't always perfect. As a result, an exception report is generated to identify any items that need manual intervention before completing the conversion. Typically this requires human intervention, which is where conversion expertise plays a key role.

Once the data set is fully converted, it needs to be validated. **Validation** is no trivial task. In many cases, there are massive amounts of data, tasks that can't be undone, and no way to test in a non-production environment.



To ensure success, it's important to create a realistic plan that ties transition and validation together. This helps track progress, identify potential issues early on, and manage risk.

A risk is any event that may or may not occur during the project. If it occurs, it'll directly impact project cost and timeline, and may indirectly impact business operations. Managing risk can be the most challenging aspect of a WLA conversion, so it's important to acknowledge and understand them upfront.

Having successfully converted 1+ million tasks for our customers in the last three years alone, we can confirm that transition and validation are completely controllable with the right knowledge, methodologies, and expertise on your side.

“ By year-end 2025, 80% of organizations currently delivering workload automation will be using service orchestration and automation platforms to orchestrate cross-domain workloads. ”

Gartner Market Guide for Service Orchestration and Automation Platforms (SOAP)

Let's take a closer look at how you can achieve all your conversion goals – without losing sleep along the way.

Managing and Addressing Risk

Managing risk begins with identification. After all, the more you can anticipate the risk, the better you can prepare to mitigate it – and possibly even avoid it altogether.

After successfully converting millions of tasks for our own client base, here are a few of our recommendations to identify, manage, and mitigate risks in your conversion:

Technical Risk

Without the right preparation, it's possible to run into technical challenges or complexities that could have been anticipated during the initial assessment. These issues can impact the timeline, costs, and ultimately, your business. Technical risks include:

- **Loss of data:** will the existing workload data be successfully migrated to the new platform without any loss or corruption?
- **Software incompatibility:** will the new platform support all the necessary operating systems, applications, and technologies used in the legacy environment?
- **Unreliable platform:** can the new platform handle workload processing with the same level of reliability and stability as the legacy system?
- **Integration challenges:** how easily with the new platform integrate with existing systems, applications, and workflows?



Overcoming Technical Risk

Early engagement of existing platform SMEs.

Ensure all information is provided to Stonebranch during the Discovery & Analytics step.

Stonebranch's experience in workload automation and service orchestration minimizes technical surprises.

PRO TIP

As a technical expert in your current WLA platform, these are the risks you overcome day in and day out. Because you know them better than anyone else, it's important to embed these technical aspects directly into your vendor qualification and selection process – well before conversion even begins. See [page 11](#) for a few suggested questions to ask prospective vendors.

Many people assume that technical challenges pose the greatest risk in a conversion, and focus their mitigation efforts there. However, we've found that they typically have a low likelihood of occurring and minimal impact when they do.

Managerial Risk

Managerial risks primarily revolve around the project's key stakeholders. This includes the project team and their sponsors – those directly involved in the selection, implementation, and operation of the new software solution. They include:

- **Lack of understanding:** stakeholders must clearly understand their roles and responsibilities, as well as the implications of their involvement. Misunderstandings can impede progress and cause missed milestones.
- **Lack of engagement:** stakeholders who feel left out, or aren't fully on board with the project, may become a roadblock. This can lead to delays when they don't engage with the project team in a timely and effective manner.
- **Lack of preparation for validation:** it's easy to underestimate the time and resources required during the validation phase. Errors missed during validation can have lasting consequences on operations and return on investment.

Managerial risks are more common than technical ones. They also have a slightly greater impact on the success of the conversion.



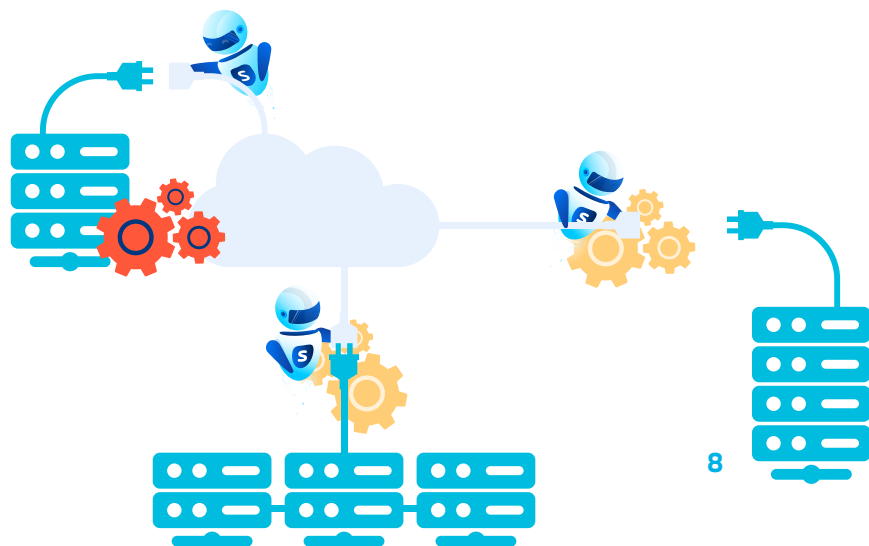
Overcoming Managerial Risk

Structured methodology and project management practice allow issues to be appropriately identified and addressed.

A project management counterpart in the customer organization facilitates collaboration.

PRO TIP

When looking for a new WLA/ SOAP provider, look for one with extensive knowledge, proven methodologies, and trusted experts to ensure a successful conversion. Put their experience to work for you!



Organizational Risk

Organizational risks relate to resources beyond the immediate project team and its sponsors. These include:

- **Third-party engagements:** it's important to identify any third-party providers involved in your IT operations at an early stage and assess whether their involvement is necessary. If their involvement is required, immediate negotiations for contract amendments should take place to prevent delays.
- **Lack of proper support across the organization:** executives and leaders should actively participate and offer their support towards the conversion project. Their communication, both explicit and implicit, will emphasize the significance of the project to the rest of the company and help identify it as a priority.
- **Lack of availability of key resources:** WLA replacement projects require resources beyond the domain of the project team. It's crucial to ensure that those resources, such as database and systems administrators, network engineers, and others are readily available when needed.

Organizational risks typically have the highest likelihood of occurring and the greatest impact on the success of the conversion.

PRO TIP

Your new WLA/SOAP provider can help you identify your key sponsors and stakeholders early and develop a communication plan to keep them engaged throughout your conversion.

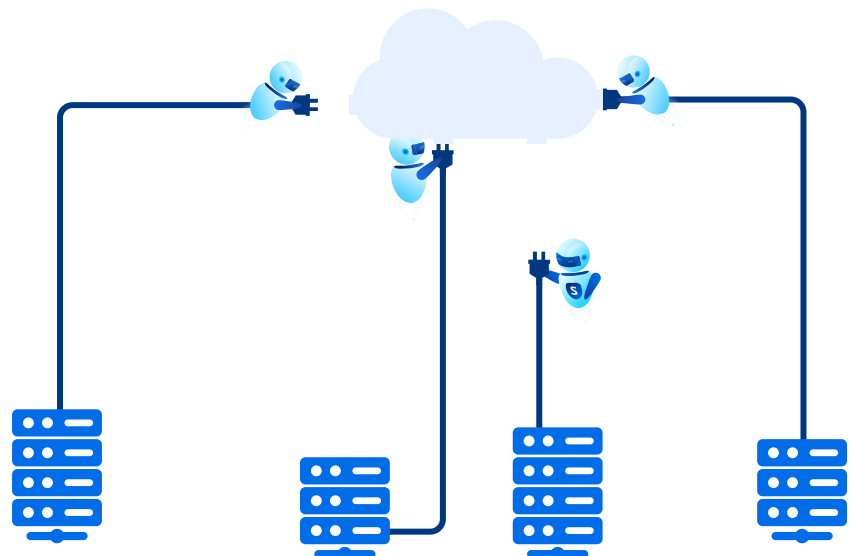


Overcoming Organizational Risk

Identify and engage project sponsors.

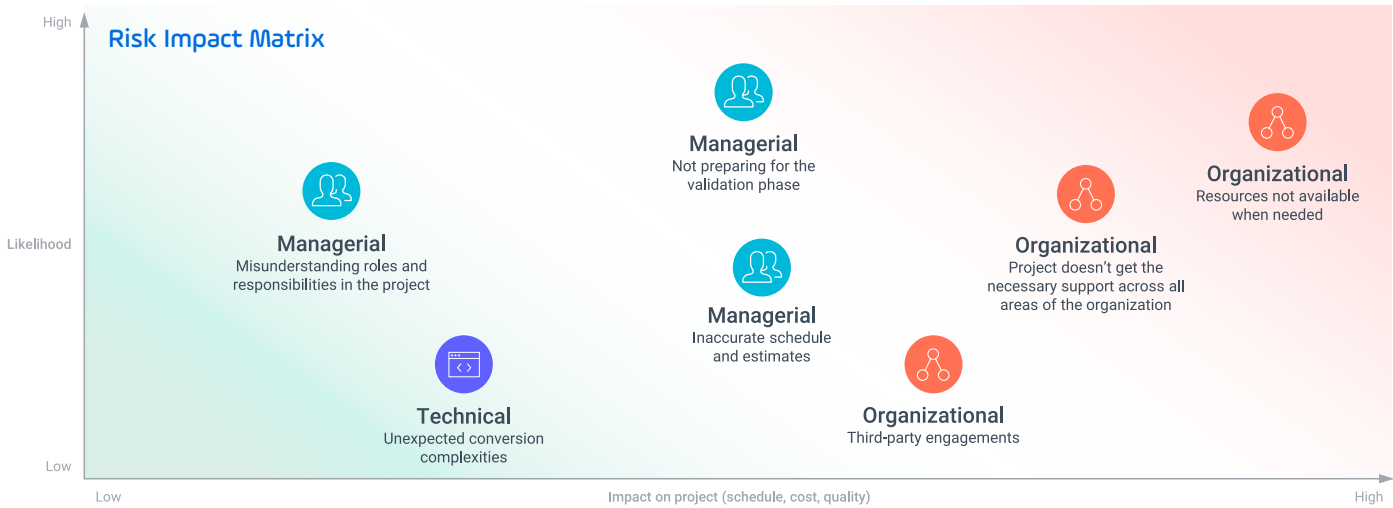
Clearly articulate the benefits of the project throughout the organization.

Engage leaders across multiple groups.



Understanding the Full Risk Landscape

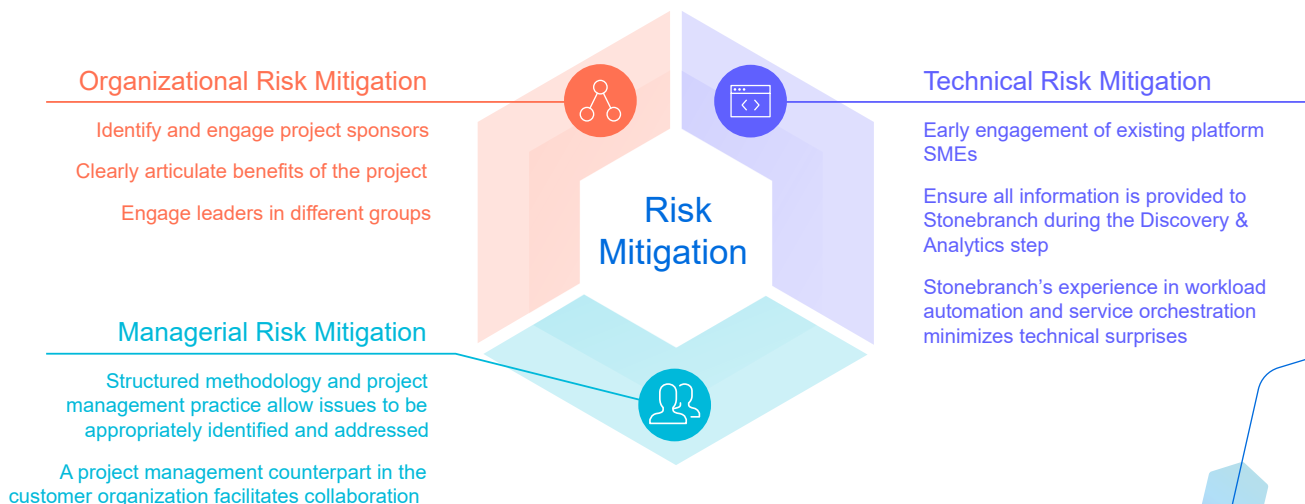
Not all conversion risks are created equal. Some risks are more likely to occur than others, and some have a greater potential impact on project cost, timeline, and business operations. The Risk Impact Matrix, below, illustrates the impact and likelihood of the risks discussed in previous sections.



It's important to understand and respond to the risks listed in the previous pages in proportion to their potential impact. This is key to a successful implementation and transition to a new system.

Overcoming Technical, Managerial, and Organizational Risk During Conversion

With strong technical expertise and rigorous project management, it is possible to mitigate the risks of conversion, regardless of the size of the project. When choosing your new provider, look for one with a good reputation and a strong professional services team. You should also ask about their experience with conversion projects and their success rate.



Ask the Right Questions: Prepare Your Software RFP

Whether organizational, managerial, or technical – there are many challenges to overcome during a WLA conversion.

You may be an expert at using and operating your current WLA platform, but it's unlikely that you have experts on your team who have hands-on experience with conversions. You need to be able to trust that your new vendor has the right people, processes, and platforms in place to support your conversion with confidence.

Begin building trust early – well before your conversion even begins. Make a list of your greatest concerns, then turn them into questions to ask potential vendors.

Here are a few managerial and organizational questions to get you started in developing an effective RFP (request for proposal). A more comprehensive list of question is available [here](#).



MANAGERIAL RFP QUESTIONS

Describe the roles and responsibilities of each member of the implementation team, including the expected time commitment from each role.

Describe the skills and background our administrators need to effectively support your solution.

Provide a suggested project plan for this implementation.

Provide implementation project plans for existing customers of similar size and scope. What challenges did you face in these implementations, and how did you overcome them?



ORGANIZATIONAL RFP QUESTIONS

What kind of onboarding is required to ensure a smooth transition to your solution?

What types of training do you provide (e.g., on-site, classroom, online tutorials, and/or third-party training)?

Ask the Right Questions: Prepare Your Software RFP (continued)

Here are a few technically focused questions to ask potential vendors.



TECHNICAL RFP QUESTIONS

Can your solution execute workloads that are on-premises, in the cloud, and in containerized environments?

Does your solution offer:

- Event-driven scheduling and automation?
- Inbound and outbound webhook event automation?
- Native MFT (managed file transfer) for internal systems?
- Native MFT for external systems, such as third-party vendors and partners?
- Centralized monitoring, alerting, and notifications for all jobs?
- A graphical interface for workflow creation?
- Dynamic decision-making?
- Built-in documentation?

Are all features and functionality of your solution available via any web browser, anywhere?

Is functionality the same between installed and SaaS solutions?

Can your tool execute tasks and workflows for the following third-party systems?

<<list your systems/applications>>

Can your solution re-run from a failed step or job?

Describe how your solution supports:

- Data pipeline orchestration, i.e., DataOps methodologies.
- Continuous delivery and change management, i.e., DevOps methodologies.
- Self-service automation, including role-based access and permissions.

During migration, describe how:

- Workload data will be migrated to the new platform.
- Data corruption or loss can be avoided.



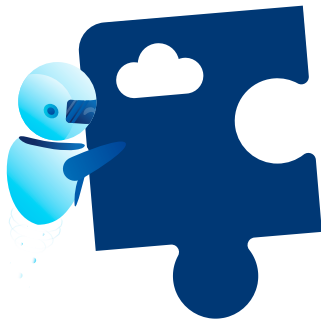
RFP TEMPLATE FOR WLA AND SOAP INITIATIVES

CLICK TO DOWNLOAD

Take the guesswork out of RFP writing with our easy-to-use template! This editable Word document helps you streamline your procurement process, get the answers you need from potential vendors, and reap the best possible return on your investment.



Say Goodbye to Sleepless Nights: The Stonebranch Difference



Switching WLA vendors can be a complex and time-consuming process without the right partner. However, by carefully planning the switch and taking the necessary steps, it's possible to minimize the disruption and maximize the benefits of a modern WLA solution.

At Stonebranch, we understand the challenges that IT teams face during a conversion. That's why our professional services team takes a comprehensive approach to support our customers throughout the process, while also minimizing any risks that may arise. We work closely with our customers to ensure a smooth transformation and address any issues that may arise, providing a holistic solution.

With more than 20 years of experience in IT orchestration and automation, Stonebranch has successfully converted millions of tasks from a variety of other schedulers. Together, our engineers have accumulated more than 100 years of experience with orchestration and automation.

By the Numbers: Real-Life Experience

The Stonebranch professional services team has a proven track record and decades of experience supporting organizations in their conversions. We've performed many of these types of projects for small- and large-scale enterprise customers like [BP](#), [ING](#), and [VIP](#).

1 MILLION

Tasks Converted

Approximately 1M customer tasks have been converted to Stonebranch UAC

2021 - 1H 2023

100%

Conversions Completed

All customers have been successfully converted

2021 - 1H 2023

75%

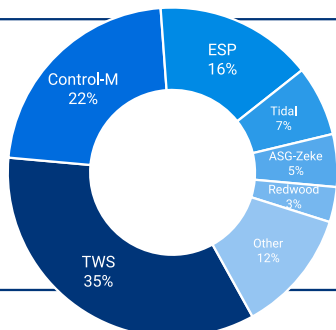
Automated Conversions

Around 75% of tasks can typically be migrated using automated conversion tools

Experienced In Legacy System Migrations

The top three systems converted are IBM TWS, BMC Control-M, and Broadcom ESP

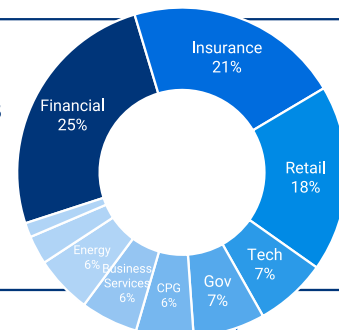
Conversions measured by project



Trusted Across All Industries

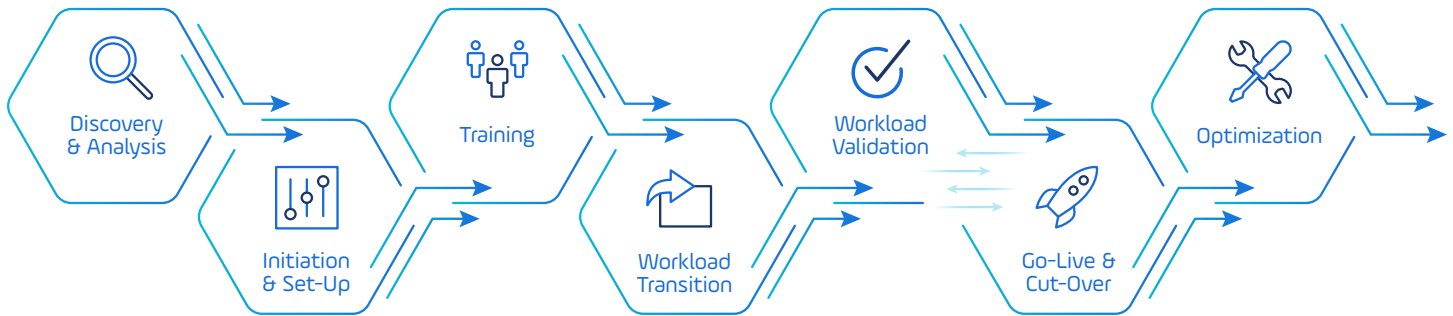
Most customers come from two highly regulated industries: finance & insurance

Conversions measured by project



Convert with Confidence: Stonebranch Transition Methodology

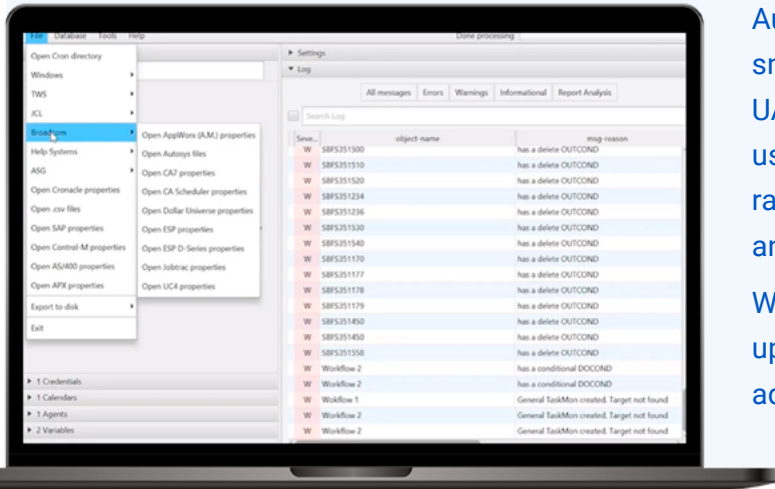
Stonebranch follows a proprietary seven-step methodology to ensure a smooth and successful conversion.



1. **Discovery and analysis:** preparation begins by gathering information about your current workload automation environment, including data design, resources, and requirements.
2. **Initiation and set-up:** kick-off meetings commence and provide clear guidance on the communication plan, project plan, and infrastructure setup.
3. **Training:** instructor-led training uses familiar content to help your team get up to speed quickly.
4. **Workload transition:** workload automation definitions are converted to the Stonebranch platform. Some of this work can be automated using XCT (see sidebar). For workloads that use extensive scripting, Stonebranch's professional services team can help you re-engineer your definitions to ensure a successful transition.
5. **Workload validation:** migrated workloads undergo user acceptance testing (UAT) to ensure they work as expected. Stonebranch can help you automate this process using the platform's built-in simulation and agent test modes.
6. **Go-live and cut-over:** migrated workloads that have passed UAT are promoted to production. Legacy systems can begin sunsetting.
7. **Optimization:** ongoing health checks and recommendations for improvement.

It's important to note that this isn't a one-size-fits-all model. Stonebranch understands that every customer has a unique combination of resources, configurations, requirements, and setup. Different size conversions require different levels of formality, rigor, and time commitment. Understanding the necessary steps is crucial to monitor project progress, address issues in a timely matter, and communicate clearly throughout the process.

Accelerate Your Transition with Automated Conversion Tools



Automated conversion tools help speed up and smooth out the move from legacy solutions to UAC. The Stonebranch professional services team uses these tools to help convert tasks from a wide range of providers, like Broadcom (ESP, AutoSys, and CA7), BMC, Redwood, Tidal, and more.

When the conversion is complete, they can then upgrade the tasks to take advantage of UAC's advanced, real-time orchestration capabilities.

Stonebranch Universal Automation Center

UAC is designed for today's challenges and whatever comes next.

- Integrate and control any cloud service provider, SaaS application, or infrastructure management platform
- SaaS-based or on-prem deployment options
- Intuitive web-based drag-and-drop workflow creation
- Native managed file transfer
- DevOps lifecycle management with built-in dev, test, prod promotion
- Pre-built integrations for CSPs, infrastructure management tools, and SaaS applications
- Role-based access to support collaboration between cloud architects, developers, IT Ops, and more

To learn more, browse through our [customer success stories](#), fill out a [contact form](#), or reach out to the Stonebranch sales team for a [demonstration](#) of the platform.



About Stonebranch

Stonebranch builds IT orchestration and automation solutions that transform business IT environments from simple IT task automation into sophisticated, real-time business service automation. No matter the degree of automation, the Stonebranch platform is simple, modern, and secure. Using the Stonebranch Universal Automation Platform, enterprises can seamlessly orchestrate workloads and data across technology ecosystems and silos. Headquartered in Atlanta, Georgia, with points of contact and support throughout the Americas, Europe, and Asia, Stonebranch serves some of the world's largest financial, manufacturing, healthcare, travel, transportation, energy, and technology institutions. For more information about Stonebranch, visit www.stonebranch.com.



UAC works in hybrid IT environments across multiple platforms and business applications in real-time. Available on-premises or as a SaaS-based deployment, the UAC is a modern platform built to scale with your business.

To learn more about how an automation platform can drive your business forward, contact us today.

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[SCHEDULE DEMO](#)

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