Top 11 Ways to Prepare for the Switch to a New **Workload Automation Solution**

Organizations have always searched for cost efficient ways to improve agility and reliability with their IT automation set up. The IT automation landscape, in response to this demand, has undergone tremendous evolution over the past few years. As a result, organizations have added new requirements for additional functionality, modern approaches, and flexible solutions that are up to the task of automating on-prem, SaaS- or cloud-based applications and platforms, or any hybrid combination of the above.

Workload automation has proven to be an area that can help organizations achieve these requirements. On the surface, switching from a current provider to a new workload automation (WLA) solution can feel daunting. However, it does not have to be a leap into the unknown. The right preparation, planning, and deployment approach, combined with the right vendor partner, can go a long way toward making the whole process run smoothly.

According to the EMA, 54% of organizations using WLA solutions are reviewing a migration to a new solution, while 38% are involved in an active buying cycle. So why all the change? Generally, this change is driven by digital transformation initiatives, the requirement to run cloud-based jobs, and scalability concerns from organizations making the move into hybrid IT environments.

Stonebranch has decades of experience supporting organizations with the transition and migration to a new workload automation solution. The process and tips outlined in this white paper represent a repository of lessons learned during each of those projects. The most important aspect we've identified over the years is that having a repeatable and scalable process for running each conversion is the key to success. Below, you will find a practical framework that we use with our customers.

4 Steps to Take Before Converting to New Automation Solutions

Flexibility, reliability, and future proofing are three main factors to look for in a good solution, but IT Ops still need to do their homework when finding the right ones to consider. Before redesigning and refactoring the current solution, IT Ops and key stakeholders should do the following to prepare:

1. Audit resources and assess the ones that create the biggest challenge.

A risk analysis will tell IT Ops if the advantages outweigh the disadvantages. Determine the pros and cons of converting to a new solution and create a wish list that defines every configuration and automated task that will reduce overhead and optimize the current environment. The wish list should also include a conversion plan that defines procedures required to run in production.
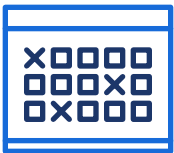
2. Kickoff the search and vetting process for a new solution six months before your desired go-live date.

Most organizations will want to be prepared to go live prior to the end-date of their contract with their existing vendor. This time frame will allow you to properly review the vendor and their capabilities. It will also allow enough time to do a proof-of-concept with select vendors, whereby you actually install and use the new solution for a period of time as a trial.

3. Always conduct market research on third-party vendors.

Don't just check the vendor website. Search customer experiences and information about the product's capabilities, specifications that match the organization's list of requirements (e.g. application integrations, platform support, processes, and users), and the cost involved to meet goals.

4. After vendors are contacted, perform due diligence by validating supplier ratings and engaging with the vendor's customers.

Automation solutions are costly, so skipping this step could leave the organization stuck with another inefficient, costly and limited solution. The chosen vendor should have a long history with successful conversions and implementations and support the product after deployment.

# 7 Steps of Converting to a New Automation Solution

Finding the right solution is just one part of the equation. The conversion process should have the following 7 key steps to ensure a successful transition. Note that each step is extensive, to ensure that transition happens as seamlessly as possible with no issues that could be presented either during testing or after the framework is sent to production.
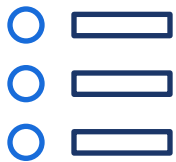
Step 1: Initiation and Setup

Every automation project requires a starting point, and this is the initiation and setup phase. This step takes careful planning. Poor planning of the automation conversion framework can create critical difficulties, prolong the conversion, and lead to problems long after the transition is completed. This phase defines the framework from an organizational perspective and the required target architecture for the new WLA solution. This phase also drives the rest of the process as the transition is set up.

PRO TIP: This step drives the success of all seven. The best planning team consists of at least one stakeholder from each involved department, including IT Ops.
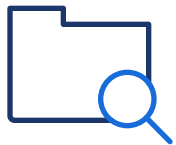
Step 2: Analysis

A good plan involves extensive analysis to ensure that the end result is both feasible and beneficial for the organization. Step two involves analyzing the project scope and ensuring that it matches what should be accomplished to meet organizational requirements. This step should include IT staff that understand internal and external components that can then be linked with the framework designed in step one.

PRO TIP: A tightly defined scope and properly identified shortcomings list will help eliminate unnecessary mistakes.

Step 3: Pilot Transition

After planning and analysis, there should be a trial run where automation workloads are tested. This is the pilot transition, when the framework is put into action without affecting current processes. Vendor consultants work with IT to develop a pilot transition to help the organization visualize and test what will eventually be the automation framework put into production. During the pilot transition, adjustments are made based on exception results generated by the WLA solution. Workloads are executed again until generated output aligns with exception criteria defined by the original analysis and framework design. Essentially, this pilot transition is a replica of production infrastructure and design, but it allows the organization to test for quality assurance.

PRO TIP: A pilot transition leads to a conversion with no risk of affecting mission-critical business processes.
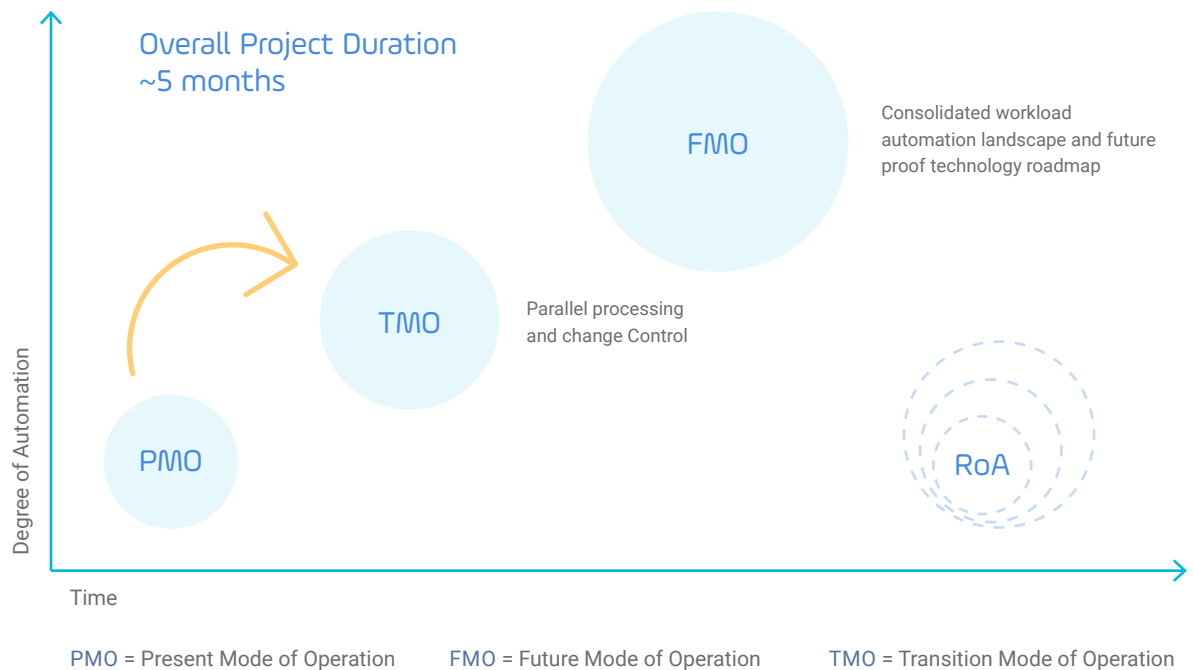
Step 4: Workload Transition

When the pilot transition has been verified and tested by the organization, the next step is to move forward and transition data to the WLA database.

Even during this phase, the organization might still choose to test the production-level tools and ask for a sample workload transition executed to view results. A good consultant vendor representative will work with the organization to execute the test run and validate results with staff.

PRO TIP: IT Ops can choose to have an additional production-level execution of the transition prior to a finalized deployment to ensure accuracy.

Overall Project Duration
~5 months

FMO — Consolidated workload automation landscape and future proof technology roadmap

TMO — Parallel processing and change Control

PMO

RoA

Degree of Automation

Time

PMO = Present Mode of Operation   FMO = Future Mode of Operation   TMO = Transition Mode of Operation

Step 5: Workload Validation

Testing doesn't stop after the pilot transition. After data and workloads are transferred to the WLA solution, the previous schedule definitions are compared to the newly defined workload definitions. This additional testing gives the organization access to forecasting reports for daily, weekly, monthly or yearly executions compared with the current thresholds, and potential application-specific requirements are verified.

PRO TIP: Continuous testing and validation ensure a smooth transition of all data during cutover with no downtime for the organization.

Step 6: Go-Live

The "go live" step (also known as deployment to production) confirms and validates final data approval from customers. Vendors should ensure that all customer requirements are met during conversion from a transition phase to a "go live" phase, ensuring that this step is error-free and runs smoothly. During this step, IT staff for the organization, as well as the vendor's consultants, should be available and onsite 24/7 to answer any questions and offer support for operations, if needed.

PRO TIP: Scheduled training provided by the vendor can prepare IT Ops for the changes in } automation procedures that they must oversee.

Step 7: Project Closure

Every large IT project has a "sign off" step. IT automation places this step during project closure. This step involves documentation of the workload automation and procedures for managing it. To ensure a proper project closure, all parties finalize relevant project documentation and go through a "lessons learned" session to make sure that future projects or project phases are adopted and planned for accordingly.

PRO TIP: Project closure is a reason for all stakeholders to celebrate, as now the benefits of WLA will be quickly realized.

How Does Stonebranch Help with Automation Transitions?

Many third-party vendors offer some of the steps outlined above, but Stonebranch offers an accompanied end-to-end transition process that supports customers every step of the way, mitigating potential and unforeseen risks. By working directly with customers, Stonebranch provides a holistic approach that solves many of the unique problems that plague hybrid cloud environments. Instead of using a "one size fits all" model, Stonebranch understands that every environment has its own resources, configurations, requirements, and setup. Working with Stonebranch does not limit the organization to our specific tools.

Being vendor-agnostic, our products work with one another as well as leveraging other third-party tools, should the organization choose to integrate a more hybrid automation solution across resources. Other vendors will restrict customers to specific automation tools, but Stonebranch provides flexibility and will work with the client's chosen applications. This benefit reduces the training requirements as staff can choose to work with tools they are familiar with.
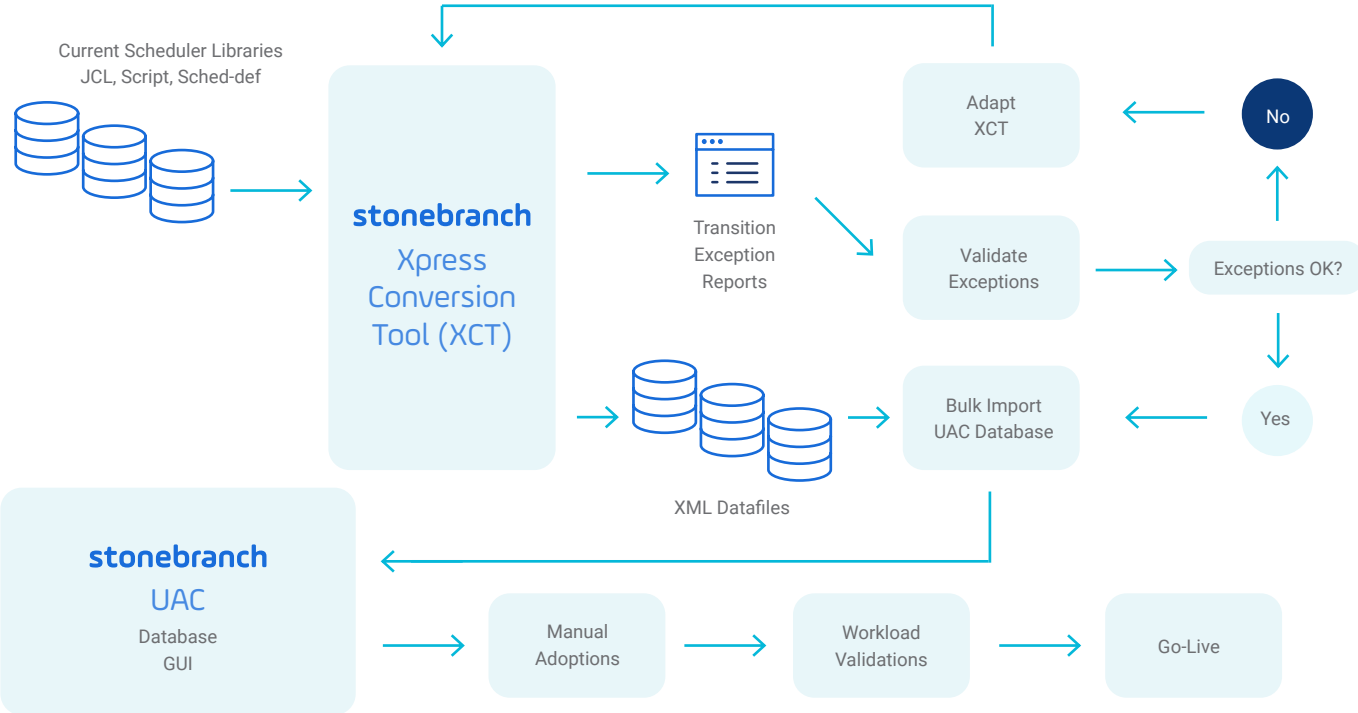
Key Benefits of Transitioning from Your Current Solution to the Universal Automation Center

Working with Stonebranch provides customers with the following key advantages:

CLOUD NATIVE – Stonebranch solutions were born in the cloud, so all our automation solutions fit perfectly within a hybrid IT environment. But we're not limited to the cloud. The Stonebranch solutions also work well with mainframe environments and large distributed environments across any number of data centers. Clients have the flexibility to deploy Stonebranch solutions in either a cloud-based SaaS model or on-prem.

LIFE CYCLE MANAGEMENT – after a solution is deployed and implemented, Stonebranch continues to support it. Our customers receive continuous and regular updates, new releases, and a solid foundation of support from specialized consultants and professionals.

SCALABILITY – growing companies concerned about scale can rely on Stonebranch's solutions to provide flexibility, whether it's current technology or future technology that might be added to the infrastructure. Stonebranch's solutions are future proof, meaning it is platform agnostic and allows the organization to scale up or down to match current growth trends.

SIMPLICITY – today's IT is dynamic and changes month to month. Stonebranch consolidates complex, scattered solutions into one control center, simplifying the way IT approaches automation in the cloud. Stonebranch's solution is an easy to use, future proof design that empowers IT Ops to make educated decisions on the way resources are deployed and managed.
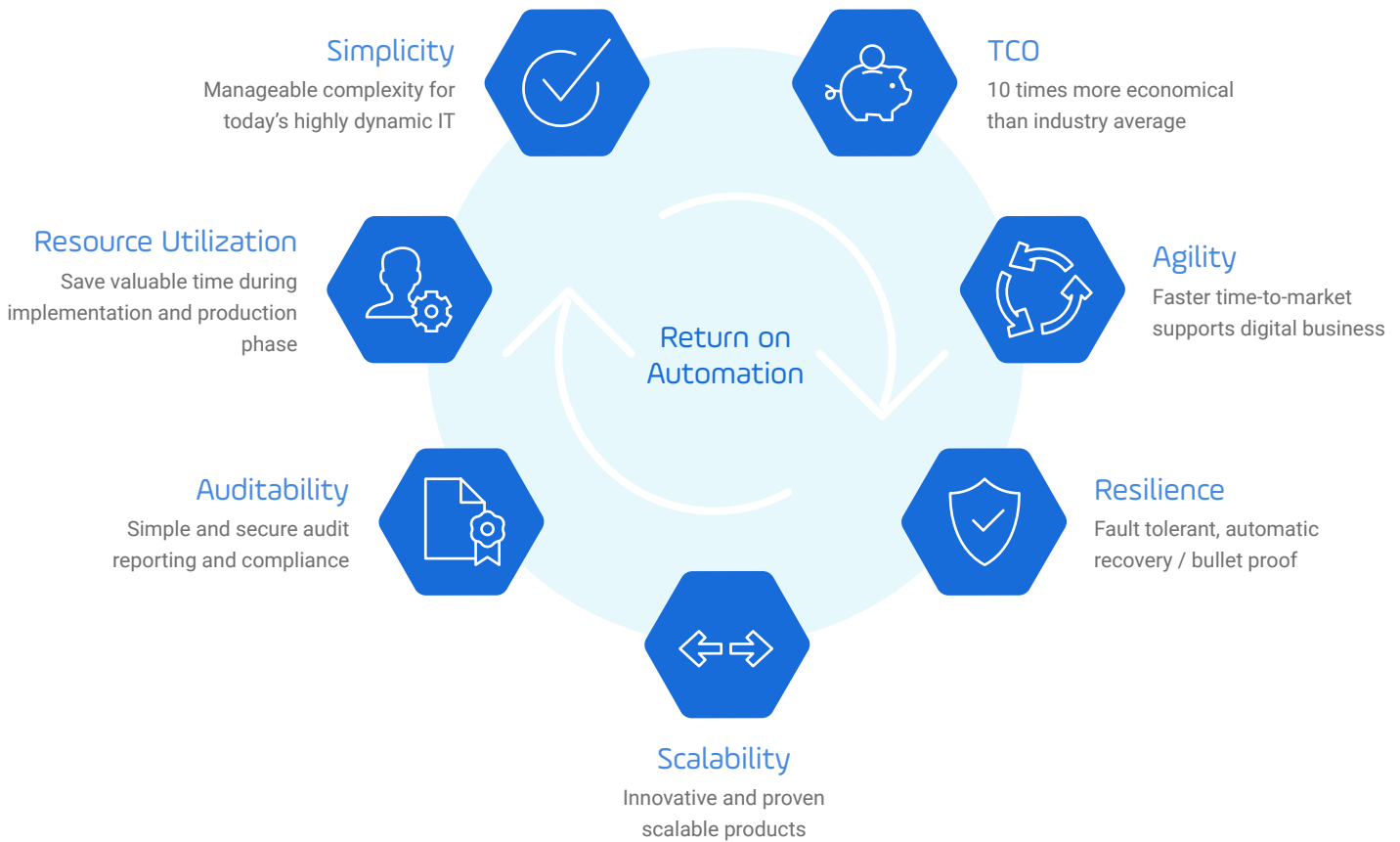
AGILITY – Stonebranch has a faster time-to-market (TTM) compared to other vendors, so its solutions support digital businesses at every stage of the digital transformation, whether they are new to automation and cloud provisioning, or have a long-standing hybrid cloud set up with complex configurations where automation hasn't been perfected yet.

RESOURCE UTILIZATION – any transition takes manpower and several hours to implement. Stonebranch reduces this timeframe and saves IT Ops valuable time with help from our professionals. By reducing overhead, your IT Ops team and critical IT staff have time to perform other critical tasks.

AUDITABILITY – an organization tied to specific data regulatory standards will be able to stay compliant and quickly run audits with Stonebranch solutions. Whether it's HIPAA, SOX, PC-DSS, or any of the other common regulatory standards, data is protected and transferred with compliance in mind.

RESILIENCE – like any IT process, errors occasionally happen and must be remedied. Usually, this requires human interaction, which can be expensive and time-consuming. Stonebranch's Universal Automation Center is resilient against errors and provides fault tolerance that automatically recovers.

SIMPLE LICENSING MODEL – no hidden costs, added support charges or any other conditional options. The Stonebranch subscription model comes with all the necessary tools, licensing and features necessary for an enterprise automation solution. We also support the conversion process with a 24/7 helpdesk, a professional services catalogue and a loyal user community.

Simplicity
Manageable complexity for today's highly dynamic IT

TCO
10 times more economical than industry average

Resource Utilization
Save valuable time during implementation and production phase

Agility
Faster time-to-market supports digital business

Return on Automation

Auditability
Simple and secure audit reporting and compliance

Resilience
Fault tolerant, automatic recovery / bullet proof

Scalability
Innovative and proven scalable products

Summary

Transitioning from old legacy automation solutions to a future proof, vendor agnostic, real-time, event-based automation system is very possible. It simply takes the right process and vendor partnerships to ensure success. By using a provider that offers a proven set of defined processes during a transition, the organization relies a lot less on trial-and-error and more on perfecting and finely tuning procedures that positively impact every aspect of business functions. Stonebranch's steps to WLA conversion success can turn an inefficient, slow, cumbersome automation environment into a streamlined, cost-effective powerhouse that drives performance and faster workflows.
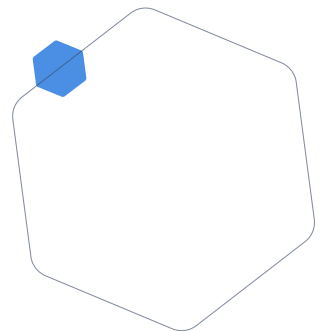
About Stonebranch

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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