

Involvement in a Tool Migration? Work Smarter Not Harder

If you're planning a tool migration, the catalyst could be due to a variety of reasons. Commonly the decision to migrate is tied to a particular business use case or part of a corporate modernization initiative (such as digital transformation or increasing data and analytics use) or may be part of optimizing the business intelligence and analytics ecosystem.

Tool Migrations Aren't Easy

Migrations can be complex, time-consuming, and costly. If not appropriately planned for and handled, the upfront costs to migrate can negate the planned savings for the first couple of years. This is especially true when an organization has waited too long (i.e., past sunset date) to retire a tool or if the mapping of the old application to the new was not thoughtfully and carefully done.

The right resources must be allocated to ensure everything that is intended to be in the new tool migrates successfully. Many companies migrate everything from one tool to the next, but what is messy and out of control in the existing tool will still be messy and out of control in the next. Migrations provide an opportunity to reset. Therefore, it's important to understand what data is being used, by whom, and where that data comes from; which reports are current, accurate, and appropriate for use; and which KPIs/expressions and metrics are relevant for the organization.

From an architectural standpoint, potential integration challenges may surface with other tools in the ecosystem. It is important to research tool and version compatibility to avoid surprises. Custom and home-grown tools also require special consideration. Often IT will recognize the technical and integration challenges but may underestimate the human emotional component. Change management is

a vital element of a successful migration because people tend to resist change and, therefore, tool adoption may be adversely impacted. It is necessary to address change management and provide communication to familiarize people with a new tool, address any concerns over new skills required, and build confidence and comfort for users of the tool.

How to Structure Your Migration for Success

With a thoughtful approach to migration, these challenges can be mitigated. The first step is to clearly understand your entire current BI and analytics landscape. Which tools are being used and how often? Are all the licenses being used, and are they distributed appropriately? Which reports and dashboards are the most important for users, and how often are they used? With this visibility into how the components of the existing ecosystem are being utilized, it will be easier to determine the needs of the new tool and exactly what should be migrated to create a clean environment.

It is necessary to then establish and communicate a detailed migration plan and timeline. Decide if the migration will be done "big-bang style" or in phases, and consider the impact of each approach.

One helpful approach is to adopt an analytics catalog to facilitate and assist the migration. An [analytics catalog](#) will deliver the visibility of the ecosystem and the analytics assets in the various tools. It will also establish a single access point for end-users for all their BI and analytics information, regardless of which tool the content exists in. Creating this view will ease the change management challenges because users need not worry about the underlying source system for their report; they access everything through a single pane of interaction. This increases productivity and efficiency for end-users – even during migration – and sustains a familiar look and feel to ease concerns during the transition. Further, this allows IT and users to reconcile and validate that everything they need is in the new platform.

Work Smarter, Not Harder

The right resources can set the stage for a successful migration. The ZenOptics [Analytics Catalog](#) is a web application that enables productivity, collaboration, manageability, and governance of the entire analytics ecosystem. In a single interface, ZenOptics provides direct access to all analytics assets, including reports, dashboards, spreadsheets, and applications – regardless of their underlying source system.

ZenOptics has helped organizations with modernization and migration initiatives from legacy platforms. ZenOptics reduces risk by negating the need for a “Big Bang” approach to the decommissioning and migration of a BI platform, thus easing the workload for the migration team and also helping users with change management. With a single point of entry, your users can log into a single system and be almost agnostic of the underlying platform. Organizations have visibility over all the analytics assets in their ecosystem, the asset metadata, and the asset usage and can phase out unused or duplicate reports as they introduce them on the newer platform. Therefore, both users and the administrators/stewards can be assured that the users are working with the appropriate, correct analytics assets to make decisions.

ZENOPTICS CAN EASE MIGRATIONS THROUGH:

- Report statistics, which provide visibility for an ecosystem assessment/understanding
- A single access point for all BI tools that increases familiarity for end-users and reduces friction during change management
- Metadata insights and multi-view functionality allows side-by-side report rationalization
- Categories organize and structure the analytic assets in a way that supports the working style of business users and analysts
- End-user access and discoverability are supported with favorites, and enterprise-wide search allows discoverability of reports, regardless of which tool it exists in.
- The ability to monitor and measure usage of the tools to better gauge traction and user adoption



Migration Methodology with ZenOptics

1 Catalog Analytics Assets
Automated discovery of existing BI, reporting and analytics landscape

2 View Consumption Insights
Report and usage statistics of entire BI/analytics landscape

3 Obtain Metadata Insights
Identify duplicate and redundant reports

4 Rationalize Assets
Rationalize BI and analytics assets based on consumption insights and metadata insights

5 Catalog Analytics Assets
Automated discovery of existing BI, reporting and analytics landscape

6 View Consumption Insights
Report and usage statistics of entire BI/analytics landscape

7 Obtain Metadata Insights
Identify duplicate and redundant reports

8 Monitor and Measure
View user adoption, tool and report usage, etc. to understand and optimize environment



Migration Team

Successful Migrations Will Yield Key Benefits

- The creation of a modern environment to support current data and analytics needs for data driven organizations
- An optimized data and analytics environment to maximize investments and save software costs in the long run
- Saved person-hours in developing the migration strategy with an established understanding of the ecosystem
- Users that are enabled to work with the BI and Analytics tools that best support their needs and can quickly discover and access the information they need

PLAN FOR THE FUTURE

Migration work is never fully done. The pace of business today will continually drive change, newer or preferred tools will come along, the organization will prioritize new initiatives, and disruptive factors may change the landscape. The important thing is to always set the stage for the future and establish a migration strategy that applies to current and future scenarios while creating consistency and ease of use for businesspeople.

Learn more about how ZenOptics can help with tool migrations and unified access to cross-platform analytics assets [here](#).