

opentext™

Modernize to thrive

Extend the ROI of your OpenText investments with Professional Services



Content

The case for continuous improvement	3
The 3 pillars of modernization success	5
Finding a path forward	6
Path 1: Application platform modernization	7
Path 2: User experience modernization	10
Path 3: Operational experience modernization	14
Path 4: Compliance modernization	18
Your modernization partner	21

The case for continuous improvement

Relying on older technologies imposes risks and limitations—from performance problems and non-compliance to security issues, lack of support, and dissatisfied users. Rejuvenating tired applications helps you reduce friction and optimize for today's demands while also seeding agility for future growth. Yet some organizations still struggle to embrace modernization for a variety of reasons:

- Gaps in the people or expertise required to modernize information management at speed.
- Reluctance to further burden IT teams, even when they do have the expertise.
- Lack of confidence in supporting teams' ability to meet business user expectations.

What's driving an increase in 2024 IT budgets?¹

52%

stated a need to upgrade outdated infrastructure

52%

said increased priority on IT projects

48%

cited increased security concerns



¹ Spiceworks, Defying Economics: IT Budgets Expected to Rise in 2024 Amid Recession Preparations. (2023)

It's a renovation, not a demolition

Modernization might sound like a heavy lift, but it doesn't demand a rip-and-replace strategy. A phased approach that considers use cases, pain points, potential impacts, and benefits is often the best way to deliver small wins that add up to big change.

Whether you're trying to move to the cloud, take advantage of the latest integrations and capabilities, or include AI and machine learning, having the right strategic advisors and technical experts is critical.

Successful modernization requires expertise in three key pillars:



**Business
acumen**



**Strategic
know-how**



**Technical
mastery**



The 3 pillars of modernization success

Modernization is grounded in continuous improvement because what your business needs today is likely different than what it will need in the future. Counting on modernization experts to help drive continuous improvement isn't just critical for business resiliency and adaptability—it also ensures you get the most out of your IT investments.

The OpenText Professional Services team focuses on **three key pillars to drive successful modernization journeys**, working in partnership with customers to address their unique business needs.

Pillar 1: Business acumen

When analyzing information management opportunities and risks, organizations should apply business principles and insights. This will enable them to prioritize modernization efforts based on:



Value for money



Business opportunity

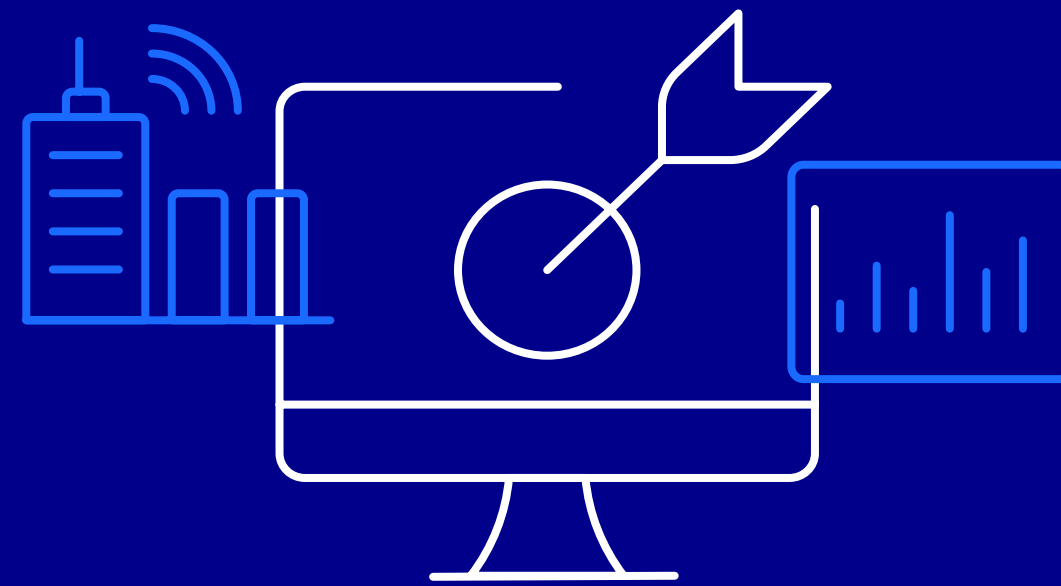


Business risk

The Professional Services team offers expert guidance based on a deep understanding of modernization business drivers and strategies. They also take into account fundamentals for implementing and operating IT platforms, the program funding needs, current technology trends, and regional business climates.

Pillar 2: Strategic know-how

To prioritize modernization efforts effectively, you need a strong understanding of business operations and their relationship to information. This allows you to maintain alignment with your organization's overall business strategy and goals.



Pillar 3: Technical mastery

To achieve optimal configuration of your information management solutions, you need expert technical support to implement modernization plans.

In combination with the in-depth platform knowledge, the Professional Services team provides technical expertise in:

- Modernization best practices, including architectural design patterns for the tech and data.
- Technical change management (i.e., ITIL).
- Tools (both productized transports and proprietary intellectual property [IP]) to accelerate tasks through highly automated modernization processes that remove manual actions and reduce human error.

Finding a path forward

You need a trusted partner to execute successful modernization that will have the desired impact on your organization. The [OpenText™ Professional Services](#) team includes technical experts, experienced strategists, and knowledgeable consultants who can help you:

- **Do it right the first time**
by avoiding common pitfalls that negatively impact cost and change management.
- **Go live faster and realize value sooner**
from IT investments by using experienced experts with best practices and tools.
- **Mitigate user adoption and customer acceptance risks**
by implementing a change management plan with tailored initiatives for user adoption success.

This guide explores four powerful opportunities for expanding your OpenText solutions with the support of Professional Services:

1. Application platform modernization
2. User experience modernization
3. Operational experience modernization
4. Compliance modernization

Let's dive in to see which modernization path could benefit your business.

[➔ Are you already thinking about modernization? Let's talk.](#)



Path 1: Application platform modernization

Modernizing information management systems improves performance, security, and flexibility so your organization can address modern work demands and emerging risks.

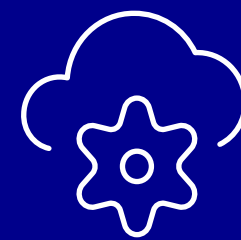
OpenText experts recommend outsourcing application operations to a managed service to take advantage of best-in-class administration with stable, secure, high-performing tools. This helps business users trust the system and is a key enabler of faster, broader adoption. A managed service also gives your teams more time to focus on high-impact, strategic tasks that support business growth.



Keep exploring



Learn how OpenText experts rapidly modernize on-premises solutions by moving them to the cloud



Get expert help optimizing information management in the cloud

What's the impact?

- **Agility through the cloud**

Moving an application to the cloud provides dynamic scalability for performance, high levels of redundancy for increased resilience, and deployment automation for more agile system improvements. Managed Services also helps organizations modernize both the application platform and administration.

- **Improved security and information protection**

Software upgrades often include security updates and patches that address known vulnerabilities and threats. These updates help protect your organization from security and data breaches. Moving to the cloud enables security maintenance through well-established standards, such as SOC 2.

- **Optimized performance and increased productivity**

Software upgrades also include performance enhancements, such as faster processing, reduced resource usage, and improved response times, which increase productivity and user satisfaction.

- **Improved compatibility and integration**

Improved interoperability leveraging ever-improving industry standards and protocols (i.e., HTML5, CMIS) and third-party APIs, makes it easier to work with other systems and share data with partners and clients. Better integration with third-party tools benefits user experiences, process management, and compliance while reducing data transfer problems.

- **Reliable support and maintenance**

Using the most current version means more timely technical support, bug fixes, and assistance. Improved long-term viability avoids costly custom solutions or migrations.



Application platform modernization with OpenText

Business acumen



The OpenText Professional Services team works with business leaders to identify opportunities for leveraging budget sources to fund modernization projects.

We evaluate options beyond simply upgrading and consider other business requirements that enrich the value expected from modernization.

Strategic know-how



Our experts start by assessing the current state and identifying possible options to achieve the organization's desired state.

We provide recommendations to help organizations visualize a path forward, including upgrading or moving to the cloud where appropriate. Proposals consider business improvement opportunities, project risk, total cost of ownership (TCO), and change management.

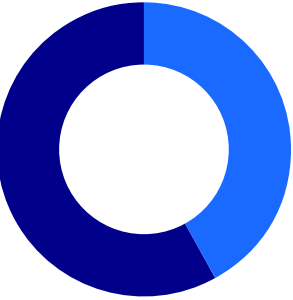
Technical mastery

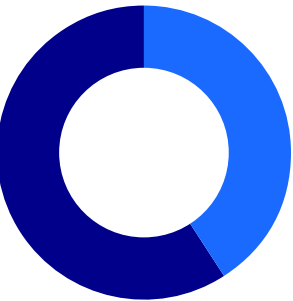


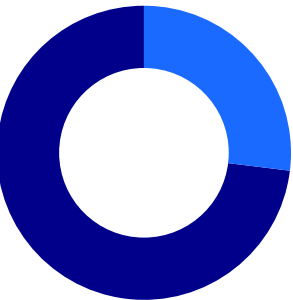
Tapping into proven strategies, proprietary knowledge, and intellectual property (IP), our technical experts help you expedite upgrades and even move your system and data to OpenText™ Cloud.

In cases where OpenText is operating your system as a managed service (on premises or in the cloud), we ensure close collaboration and communication between teams to align expectations and drive remarkable outcomes.

Path 2: User experience modernization

42%  Forty-two percent of employees say they wish their organization would provide technology tools that improve ease of use/intuitiveness

41%  and 41 percent wish for tools that help them find information more quickly.

27%  Further, 27 percent claim application overload is affecting their engagement and productivity.³

Mastering modern work means giving employees smarter, frictionless experiences. This requires having access to the information and applications that make it easy to get work done from anywhere. By delivering information where and when it's needed, organizations can modernize user experiences to ease daily challenges. For example, by integrating content management and leading business applications, organizations can meet teams where they are already working.

³ Foundry Research sponsored by OpenText, MarketPulse Survey: Digital Friction. (2023)



What's the impact?

- **Increased productivity:**

A refined user experience streamlines workflows, delivers intuitive navigation, and reduces learning curves, making it easier for users to accomplish tasks.

- **Greater satisfaction:**

Users are more likely to enjoy using the platform, leading to a better overall attitude and contributing to an organization's ability to attract and retain talent.

- **Reduced training and support costs:**

A user-friendly, intuitive interface allows users to quickly grasp software functionality, minimizing time and resources required for onboarding and support.

- **Lower error rates:**

Easy-to-understand and intuitive software leads to fewer mistakes, higher data accuracy, and increased efficiency.

- **Increased user adoption:**

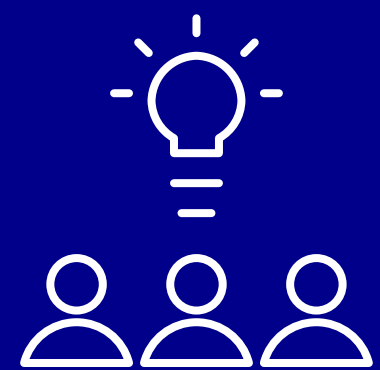
Encouraging users to embrace the software in their daily tasks allows the organization to fully leverage its capabilities to meet productivity and compliance objectives.

- **More flexibility and adaptability:**

When responsive design makes the software accessible across different devices and screen sizes users are able to work seamlessly in various environments.



Keep exploring



See tips for managing user resistance to change

How to modernize your user experience with OpenText

Business acumen



Our Professional Services team offers:

- Planning support that identifies financial and other business implications of poor solution adoption.
- Change management strategies and initiatives.
- Best practices for maximizing user adoption while limiting total cost of ownership (TCO).

Strategic know-how



Our expertise in governance (business structures, rules, processes, etc.), IT and information architecture, and user change management helps identify and prioritize the highest-impact investments.

For example, OpenText offers PROSCI-certified change management experts to assess user learning needs. We also work with change management teams to recommend strategies and practical tools.

Technical mastery



A productized integration brings new and improved capabilities, but configuring functions to align with customer-specific situations is critical to managing project costs and achieving maximum benefit.

Our Professional Services team's technical and change management expertise ensure ideal results.

Real-life example of user experience modernization

Salt River Project achieves digital transformation

Salt River Project (SRP) is an electric and water utility in Arizona. Its outdated system of storing tons of information in disparate legacy systems introduced risks and unnecessary delays.

SRP was drawn to OpenText's vision of managing information and adding value by integrating unstructured content with other business applications, like SAP.

Modernization with Professional Services

OpenText has worked with SRP through its 10+ year transformation journey.

- **Customer challenge:**

Displace legacy file-shares and Microsoft® SharePoint libraries in favor of [OpenText™ Extended ECM](#) and integrations with business systems including SAP®, with a full enterprise rollout in three years.

- **What we did:**

Developed a strategy to configure and deploy Extended ECM to 400 departments.

- **How we did it:**

- » SRP and OpenText worked as an integrated team, developing a deployment methodology based on proven processes, artifacts, and technology.
- » Significantly accelerated the deployment and followed a rigorous process in a consistent manner for business users.
- » Modernized experiences for 5,000 users across 400 departments.

- **Customer outcomes:**

Improved service, reduced costs, mitigated risk, and perfect positioning to manage complex information needs today and into the future.

[Read the full story](#)

“They’re actually a part of our team. It’s not like it’s the OpenText and SRP teams. We’re one team and it’s been a really good working relationship.”

Vince Bocchieri,
ECM program manager Salt River Project

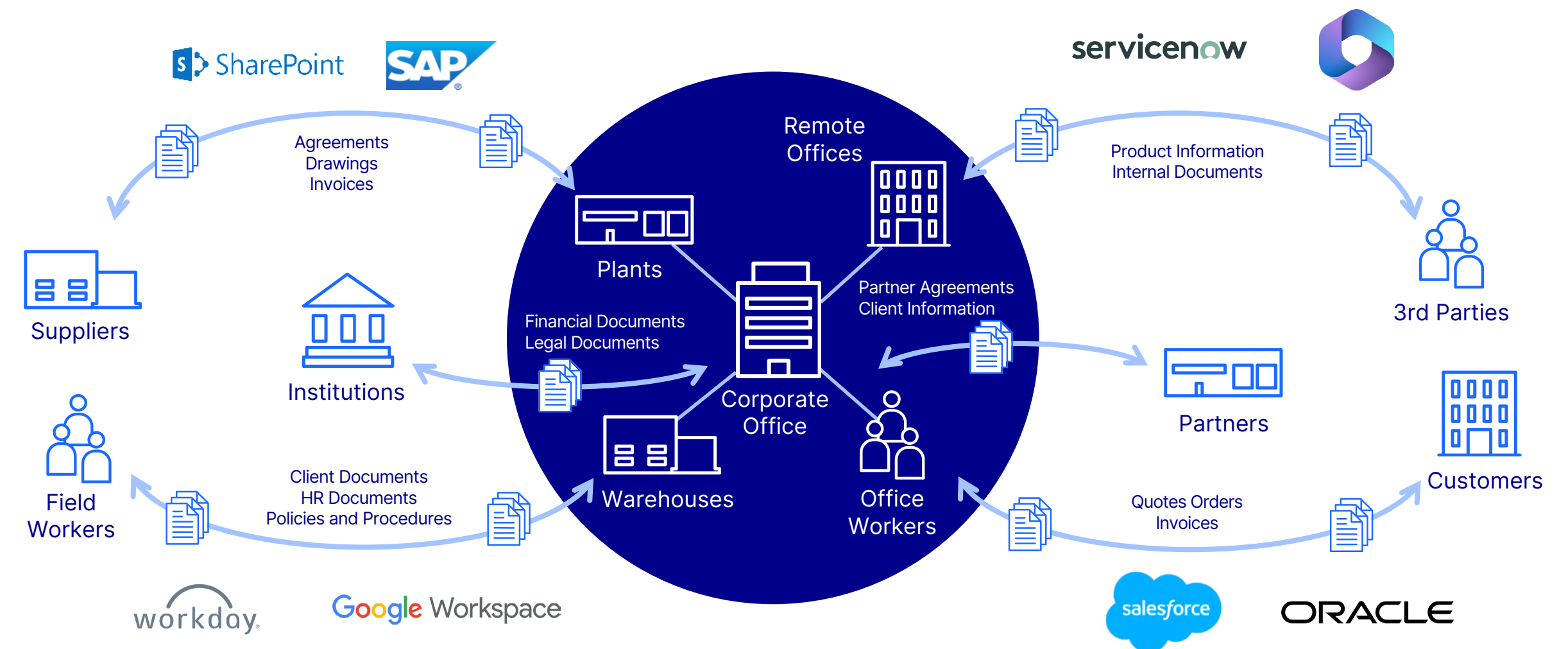
Path 3: Operational experience modernization

ERP, CRM, HRM, and SCM are just a few of the acronyms representing massive business-critical information systems. All too often, process flows don't manage relevant content, such as documentation, correspondence, and rich media in context of the process.

Operational experience modernization requires **enterprise application integration (EAI)** that seamlessly connects content management with leading business applications where your teams are already working, such as SAP®, SuccessFactors®, Salesforce®, Microsoft®, Google Workspace, and others. By providing content in context, organizations can deliver operational experiences that ultimately support employee and customer experiences as part of a total experience strategy.

EAI embeds information management directly into workflows while AI and analytics integrations serve up insights for optimizing business process management.

Operational complexity we can address



Keep exploring



See how to fast track enterprise application integration with Microsoft, SAP, and Salesforce.



Fast track integration of operational systems used in engineering and construction.

The impact of operational experience modernization

- **Optimized workflows:**

Streamline processes within enterprise applications your teams rely on, like SAP SuccessFactors, Microsoft, and Salesforce. Reduce redundant tasks, such as switching between applications, and wasted time.

- **Improved data accuracy and insights:**

Make accurate, timely content and insights easy to access within business processes to drive

better-informed decision-making. Rich analytics give insights into processing, including choke points.

- **Reduced information chaos:**

Overcome siloed data, content sprawl, disjointed workflows, and managing disparate systems. Use machine learning to optimize metadata extraction and inform process routing.

Top inhibitors of employee engagement and productivity⁴

46%
complex
workflows

41%
poor data
quality

38%
lack of
automation

4 Foundry Research sponsored by OpenText, MarketPulse Survey: Digital Friction. (2023)



Operational experience modernization with OpenText

Business acumen



Understanding common process automation challenges, as well as information needs for critical decision-making, sets the stage for impactful operational experience modernization. Our Professional Services team partners with customers to:

- Identify line of business processes that could benefit from modernization.
- Align modernization goals, business goals, and budgets.
- Analyze opportunities for phased modernization to impact more and more business processes.

Strategic know-how



Organizations need to integrate leading business applications in a way that manages cost while reducing deployment risks.

OpenText Professional Services experts identify opportunities for modernization based on requirement trends, proven solution design patterns to address them, and the unique needs of various teams and their business processes.

Technical mastery



Expert business application integration requires that solutions be operated, maintained, and upgraded over time.

OpenText Professional Services configures functionality for greatest impact and ensures solutions are easy to maintain in the face of new business challenges.

Real-life example of operational experience modernization

Adecco Group automates personnel filing process

The Adecco Group, based in Zurich, Switzerland, operates in 60 countries. Adecco is the world's leading provider of temporary staffing, permanent placement, career transition, and talent development. OpenText solutions enabled them to fully automate a formerly manual, time-consuming personnel filing system.

Modernization with Professional Services

- **Customer challenge:**

The inefficient filing system made it time-consuming to locate and deliver files to staff. Maintaining document security and compliance was also costly and challenging.

- **What we did:**

Established a cloud-based information management platform for automated capture and filing of HR documentation with [OpenText™ Extended ECM for SAP® SuccessFactors®](#) and [OpenText™ Intelligent Capture](#)

- **How we did it:**

» An integrated Adecco and OpenText team developed the strategy and detailed plans to transition to the new digital-first HR filing application.

» OpenText established Extended ECM for SAP SuccessFactors and Intelligent Capture in the Microsoft® Azure cloud with secure integration to Adecco's IT environment, including their existing HR system.

- **Customer outcomes:**

- » Saved time and was able to deliver higher quality documentation.
- » Improved access to 30,000 personnel files, with 1,300 staff in 200 locations securely connected to the cloud-based solution.
- » Reduced processing and administration costs due to automated workflows and case management.
- » Compliance with legal requirements, such as GDPR and labor laws.

[➔ Read the full story](#)

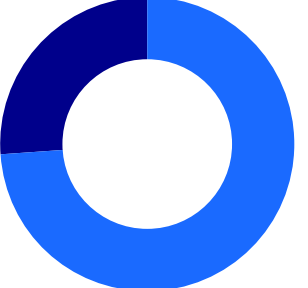
“With the OpenText technology, our goals were to integrate and automate all relevant processes for our personnel filing solution. This enables us to save time and deliver higher quality documentation.”

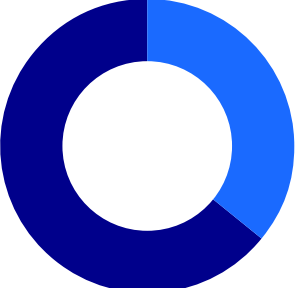
Martin Mahler,
Director of Business Process Transformation, Adecco Group

Path 4: Compliance modernization

Older systems supporting critical business processes frequently contain sensitive data that needs to stay accessible, protected, and stored in accordance with legal obligations. Legacy applications may not be capable of meeting modern regulatory requirements. Maintenance and support can drive up costs to reduce risk exposure.

Modernization offers a manageable path to lowering compliance costs while ensuring that the software (and organization) adheres to industry regulations, standards, and internal policies. It can mitigate litigation exposure by proactively managing personally identifiable information (PII), intellectual property (IP), and other sensitive information. Protection is rounded out with tools to optimize information governance, including records management.

74%  of global security decision makers estimate their organization's sensitive data was breached at least once in the previous 12 months, and

36%  estimate three or more breaches.⁵

5 Forrester, Security Survey. (2022)



The impact of compliance modernization

- **Risk mitigation:**
Reduce the risk of penalties, fines, reputational harm, or legal issues.
- **Enhanced data security:**
Implement encryption, access controls, and secure storage to protect sensitive data and reduce the risk of data breaches or unauthorized access.
- **Increased trust and credibility:**
Demonstrate your organization's commitment to maintaining high standards and adherence to legal and ethical requirements, building trust among customers, partners, and investors.
- **Standardized processes:**
Bring consistency to operations, achieving better control over the software platform's functions and reducing the risk of errors or inconsistencies.
- **Culture of responsibility:**
Promote a culture of responsibility and awareness within the organization, fostering a more structured and ethical approach to operations.
Improve internal governance to support the organization's long-term sustainability and growth.



Compliance modernization with OpenText

Business acumen



Our Professional Services team brings practical knowledge of regulatory and legal requirements and proven approaches to mitigating risk without unnecessarily taxing the organization's financial position.

Strategic know-how



Our experts devise compliance modernization plans to fit within the business's regulatory obligations, budget, and immediate modernization needs with an eye on the future.

Significant improvements in AI and machine learning will be considered for automating otherwise costly compliance tasks, such as classifying and redacting content.

Technical Mastery



We work closely with customers to master technical compliance modernization.

This ranges from structuring retention and disposition rules into a records management solution, to configuring AI and other machine learning technology to identify PII data patterns and configuring the mitigation logic (i.e., redaction).

Your modernization partner

Every company has a unique path to modernization. We help you find yours.



We're analysts with the business acumen to identify core requirements and develop a viable vision that becomes a solid solution.



We're strategists with the know-how to provide guidance around a tailored modernization trajectory and map out the steps.

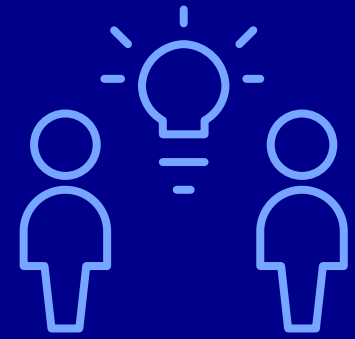


We're technical masters who are product certified and have unfettered access to Engineering, Support, and the collective experience and expertise of 1,000+ information management consultants worldwide.



“We wanted a partner with real expertise and experience in content management, and the OpenText Professional Services team fit the bill perfectly. From our first discussions, their team clearly understood our business goals. And their solution offered excellent document management capabilities and ease of use.”

Gregg Greene,
Digital Technology Engineering Advisor,
Western Midstream



Explore strategy and advisory services >>

Propel your business into the future with modern solutions

Every company has a unique path to transformation. OpenText experts drive digital transformation and cloud modernization to harness the full potential of information management solutions.



Explore consulting services >>

Deploy optimized information management solutions

Successful deployment means more than just installing and configuring software. We are committed to providing a best-in-class implementation and onboarding experience for our customers.



Explore learning services >>

Empower staff to solve business problems

Tap into years of experience to turn desired business results into reality. Our experts deliver measurable business outcomes that ensure your business maximizes the ROI of your OpenText solution.



Explore managed services >>

Manage your system while securing your information

Have peace of mind that systems are expertly managed by OpenText for peak performance 24x7. Platform, solutions, and solution experts provide a frictionless experience.



Ready to modernize? Let's talk. >>

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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