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A COMPLETE GUIDE TO THE SIDE BY SIDE APPROACH

For many organizations, the benefits of transitioning to new software may be evident, and yet they may never make the change. The average length of buying and implementing the new software is nearly six months and may take up to 5% of their budget.

You may be one of those organizations or enterprises that may be considering Windward as your new document automation software, but something still stands in the way of making the change. Here are some of the reasons for this challenge, and how to solve them.

“THE SIDE BY SIDE APPROACH MINIMIZES THE RISKS ASSOCIATED WITH RIPPING AND REPLACING AN ENTIRE SYSTEM IN JUST ONE GO.”

The Expense Involved in Setting Up a New Solution

After spending the budget on the current document generation solution, it becomes a challenge having to spend a similar amount or even more on a new solution. There may be a number of expenses involved like setting up new templates, downloading extra software, and probably IT support to program the solution. But it is safe to say Windward could reduce the costs involved in creating documents as there are flexible monthly plans and subscriptions.

New Software May Require More Training Time for Employees

Employees may find it hard to get familiar with the new software and might not be willing to learn new tricks all over again. This will also take up money and time that an organization may not be ready to spend. Again, Windward cuts out the learning curve as most of the sections in the software are intuitive and user-friendly.



Fear that the Document Automation Software May Create Problems Instead of Solutions

With unfamiliar software comes mistakes, and some organizations may not be ready to deal with errors that employees make as they get used to the new software. Some errors may be too costly for the organization, so they simply put off transitioning to new software despite the benefits of new document generation software.

Introducing the Side by Side (Parallel) Approach

The side by side approach is a perfect way to address the different fears that organizations and enterprises have when it comes to switching solutions. We encourage organizations to employ this technique as they prepare to adopt a new document generation solution like Windward.

The side by side approach allows for the use of both the existing and new doc gen software running parallel to each other. This enables users to continue with the familiar tools that they still find helpful but also benefit from the improved ones that the new tool like Windward offers.

For example, if the organization is already using Crystal Reports to generate reports, it does not need to be discontinued instantly. Your enterprise can continue using Crystal for reports while also integrating Windward to do much more than just create reports like for automated email delivery of client's statements, preparation of proposals, and so much more. In fact, you can engage Windward to deal with complex and challenging documents with the help of new, no-code templates at your disposal.

This approach will ensure that the employees will not have to rush to learn new software, they can continue using the familiar Crystal Reports or HotDocs to generate reports while also automating the other documents that they originally had to do manually with the help of Windward.

This parallel approach presents the opportunity to slowly phase out the existing solution with no crash deadlines for this to be completed.

In essence, the side by side approach minimizes the risks associated with ripping and replacing an entire system in just one go.

Benefits of the Side by Side Approach

Risks are Managed: Among all the other options of replacement, the side by side approach presents the least risk. All the risks are managed because you can still turn to the original system when you are not sure of how the new one will perform a particular task or even when you notice that you have made a mistake with the new one. The existing system acts as a backup whenever you hit a roadblock with the new one.

More Time to Learn: Even though the employees will still be using the existing document generation software, they have full-time access to the new one, which means they can keep testing it as they become more familiar with it.

It has been shown that employees who are not on a “swim or drown” program will master the system much better, in the end when the new system is fully in use, they are in a better position to get the best of it. Even people who are not so welcoming of change will have enough time to let go of their bias and willingly accept the new solution.

Fewer Complaints: In many organizations where other strategies are used, there are a number of complaints that IT will have to deal with either because someone thinks their data may have disappeared, they cannot find their way around the new interface, or they missed the memo announcing the changeover. With the side by side approach, however, by the time the new document generation system is the only one running, most employees (if not all) will be used to it and probably eager to use it since they can see its benefits over time.

How to Implement the Side by Side Approach?

Implementation of the side by side approach begins with entering data into the system. The same data that you use in the existing system needs to be available in the new one. This may take up the most time but entering your data now will prove useful in the long run.

Next, the setup is not different from most other approaches only that there is no need to take down your existing software.

Once the new document generation software like Windward is up, you can then start using it beside the existing system. Small groups can be trained at a time on how to use this solution.

The good news is you can keep using the old solution and its templates, but engage Windward to create new templates, and revamp any existing templates that may require major changes or templates that weren't designed as per your needs or match up your expectations.

Furthermore, when implementing Windward specifically, the amount of employee training is minimal because it integrates with Microsoft Word and other existing applications. Integrating into familiar software means that employees are learning how to use Windward in an environment they are already comfortable with.

Once the new document generation system is in use, it is a good idea to carry out an evaluation

of its performance. The parallel period is an opportunity to compare the performance of the new document automation system with the existing one so that you can be sure that the new one will improve the efficiency within the organization.

Some organizations may decide to have a time frame within which the side-by-side process will run, after which they can choose to discontinue the existing one. Another positive of the parallel approach is that by the time you choose to completely discontinue the existing system, the new one is already in place and there will be hardly any disruption as the changeover is carried out.

Recommendation

Making a switch to a new document automation solution like Windward can indeed be a challenge, but the side by side approach has been successfully implemented in different organizations worldwide. As you introduce Windward to your system, this is a good strategy to employ.

The employees will have sufficient time to familiarize themselves with the new templates and tools available to them as they use both your current document generation system and well as Windward. Considering that Windward is a user-friendly system, the period that you would have to run both systems side by side will not be too long. You can even take the chance to provide feedback to the support team in case you find that some of the features you really loved in the existing solution may not be available in the new one. Some of them may have actually been enhanced to do much more and you will come to love how they perform tasks.

In a nutshell, you don't have to be afraid anymore to make the switch to Windward while you embrace the side by side approach!

