

# 6 Steps to Replacing Your Legacy Software

enable

**As the world becomes increasingly digitized, businesses need to keep up with the changing landscape to remain competitive. One area where this is particularly important is rebate management.**

Many companies still rely on legacy systems to handle their rebate programs, which can be time-consuming and error prone. To address these issues, more and more companies are moving to cloud rebate platforms. This checklist shows you 6 steps to take in replacing your legacy system and practical advice on how to make the transition smoothly and effectively.



## 1. Identify The Right Software that Meets Your Business Needs and Goals

Before upgrading your rebate management software, assess your current system and identify areas where it falls short. This will help you define your key decision-making criteria and ensure that you select the right vendor and software to meet your needs.

To begin the process, start by understanding what you need from a new rebate management system. Identify the specific features and functionality your business requires and establish clear goals for the replacement process.



## 2. Prioritize People and Culture

When it comes to migrating legacy systems to the cloud, some companies tend to focus too narrowly on the technical aspects and neglect the importance of people and culture. Companies that prioritize people and culture alongside technology tend to have a higher chance of success and ensure buy-in from all stakeholders.

To achieve this, it's important to involve your people in all conversations related to the migration process. This includes providing them with opportunities to provide input and ask any questions they may have. By doing so, you can ensure that everyone is on the same page and understands the benefits of the migration.



### 3. Develop a Thorough Project Plan

Migrating a legacy system to the cloud is a complex project that requires a well-defined plan with clear timelines, resources, and roles and responsibilities. To ensure success, the project should be divided into multiple phases, each with its own set of milestones and deliverables.

Creating a comprehensive project plan is essential to ensure that the project is executed smoothly and on time. The plan should be realistic, taking into account factors such as technical complexity, resource availability and potential setbacks.



### 4. Mind Your Data

Data loss is a major concern for companies when replacing legacy systems. To mitigate the risk of data loss during the process, prioritizing data protection and migration is essential. This means ensuring that all data is backed up and migrated to the new system with the utmost care and attention.

One key best practice is to avoid “throwing away” the old software until you are sure the new one is running smoothly. By keeping the old software running in parallel with the new system, businesses can continue to access critical data in case of any issues during the transition. This approach can also help minimize downtime and disruptions to daily operations.



### 5. Train Your Team

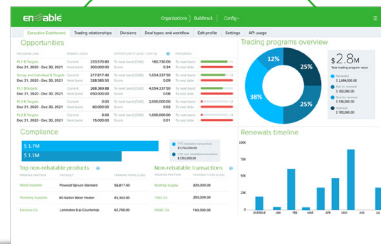
Providing employees with training on how to use the updated software and the benefits it brings can be a critical step in successfully transitioning away from legacy systems. By offering comprehensive training, businesses can empower their employees to work with the new software confidently and efficiently.



### 6. Phasing Out Your Legacy Software When the Time Is Right

When upgrading to a cloud-based system, it’s important to consider how to handle your legacy software. In many cases, you may need to encapsulate certain components of your legacy system to be used within the new system. Additionally, you’ll need to access data and documents from your legacy system until a new data migration plan is established.

To ensure a smooth transition, it’s important to develop a “retirement plan” for your legacy system. This plan should outline how long you plan to continue supporting the old system and how you will manage the transition period.



**Looking to replace your legacy system?**

Schedule a demo at [www.enable.com](http://www.enable.com) or get in touch with us at [hello@enable.com](mailto:hello@enable.com) to see how we can support your software migration.