Five Strategies for a Smooth Transition to BMC Helix

Best practices to make the move and achieve long-term value
Prepare to Succeed

Moving to BMC Helix can deliver transformative value for your organization. Shifting cost from CapEx to OpEx can improve cost efficiency and reduce total cost of ownership (TCO)—and that’s just the beginning. The agility of the cloud can help accelerate digital transformation and innovation, a key priority predicted to account for more than half of IT spending by 2023.¹ As part of this focus, a cloud model also allows IT to shift attention from routine maintenance, service quality, and firefighting tasks to higher-level work with greater strategic value. Real-time updates allow new solution capabilities to be exploited more quickly, while more consistent, standardized processes across business areas help IT drive operational excellence.

But success with BMC Helix requires intention and vision. To achieve optimal results, you need to understand where you are today, where you want to go, and why. Once your objectives are clear, you’ll need a focused plan to achieve them. And as you proceed through your BMC Helix transition, you’ll need to be able to evaluate your progress and ensure effective execution every step of the way.

In this e-book, we’ll discuss five essential strategies for success to get the most from your move to BMC Helix:

- Make a plan that includes people and process—not just technology
- Configure BMC Helix purposefully for ongoing use case expansion
- Never stop enabling
- Optimize day-to-day operations
- Measure and report on your success

Make a Plan That Includes People and Process—Not Just Technology

The way that companies deploy technology has changed considerably. Multi-year, waterfall-style projects have given way to a faster, more agile process in which IT and business teams collaborate in an iterative and responsive fashion. And users are a key part of the journey as well, brought along from the early stages to ensure full acceptance and utilization.

**Pre-go-live**

Set expectations for the project based on the business case for your transition to BMC Helix. Identify KPIs to measure success, create a baseline and targets, and then check progress using these metrics at regular intervals. Agree to a mechanism for dealing with deviation from your key milestones before you begin.

A transition to BMC Helix is also a valuable opportunity to **standardize, simplify, and consolidate processes** across business groups. You should also **minimize customizations** prior to the change.

To prepare users for go-live, **create involvement and anticipation** from early on with a proactive internal marketing and communications plan. Help people understand the changes to come, and how they’ll benefit. Conduct remote sessions with fun quizzes and prizes. On the technical user side, **identify and work with key change agents** in your organization. BMC Helix offers valuable resources like a peer to peer community, and shared documents that can be leveraged.

**Prepare to let go.** One of the reasons you’re moving to BMC Helix is to escape the overhead of managing some or all of your infrastructure and applications. That means the transition will involve relinquishing some level of control. Still, the solution you’ve chosen offers the telemetry, ownership, and engagement to meet your business needs. Generate awareness of the need to ‘let go’ in an empathetic manner.

**Post-go-live**

In keeping with the agile cloud-based service model, **go live quickly with a viable product** to get users onboarded and show immediate value. You can turn on additional functionality over time as users become more familiar with the product. **Hold regular meetings** with stakeholders, champions, and your service provider’s customer success team to track your progress and evaluate your roadmap.

To promote adoption, **offer accelerators** (short, focused training modules) highlighting best practices to get more from the solution. **Keep working with change agents** to understand adoption trends and identify ways to improve the user experience. **Drive continuous improvement** with enablement events to show off new features, answer questions, and demo the solution.

**Establish a community of practice** where self-forming teams identify new ways to use the solution to solve problems, similar to Agile sprints. Run internal competitions to encourage innovative use of the solution. Measures like these will help users take more ownership of value realization and help drive utilization.

² [https://www.scrum.org/resources/what-is-a-sprint-in-scrum](https://www.scrum.org/resources/what-is-a-sprint-in-scrum)
Configure BMC Helix Purposefully for Ongoing Use Case Expansion

Before you can deliver full ROI for your BMC Helix transition, you have to understand what it is you’re trying to achieve, and how. Is your goal to reduce cost, complexity, and risk? Become more agile in adopting new capabilities? Improve customer-centricity or use data to drive actionable insights?

Your objectives will help you choose the right approach for your project:

- If you’re seeking to leverage your existing data, a lift-and-shift approach can help you reduce cost and introduce new innovations.

- IT modernization and transformation initiatives are best achieved through a greenfield approach (i.e., a new product instance with no legacy data) with cyclical, iterative phases.

- To realize a combination of these outcomes, it’s best to make a phased transition to BMC Helix.

Consider your existing system data—an important, often underappreciated factor in the transition to BMC Helix. Do you want to move existing data into the new system or archive it periodically? The choice you make can impact usability and performance, so make sure you understand which data is required by your business.

Once you’ve made the transition to BMC Helix, think about your project in terms of use cases, and proceed with an iterative approach to planning, deploying, extending, and optimizing your capabilities. Collaborate closely with your DevOps team to build a quarterly roadmap of your use cases, then plan to deliver these use cases in short sprints of no more than four weeks each.

Define your desired level of service provider engagement. Some organizations choose to keep the vendor engaged with their company every step of the way, in alignment with internal stakeholders. Others prefer a completely hands-off approach, focusing instead on building their own core competencies. There’s no single right answer here; different approaches make sense for different companies. Just make sure you’re clear in your own mind and with the team.
Never Stop Enabling

Moving to BMC Helix isn’t just about deployment—it’s about lifelong enablement and continuous learning. Given the rapid rate of technology change and product updates these days, skills just don’t last as long as they once did. Learning preferences and modalities have changed as well, especially with COVID-19, as users grow accustomed to more remote, self-paced, and shorter content with 24 x 7 accessibility. With this in mind, your training strategy should encompass the entire project and customer lifecycle, and provide customer subscriptions that are always available.

**Phase 1**

*Pre-assess skills and plan training*

Instead of starting entirely from scratch, tailor your training to your user community. Some people will have pre-existing skills, while others will have different needs based on their roles and responsibilities. Identify your target groups and their needs, then develop a specialized, role-based education plan.

**Phase 2**

*Up to four weeks before go-live*

Make sure user acceptance-testing team members such as the project manager, admins, and development teams have the skills they need to play those roles effectively on day one. Combine formal training with customized knowledge transfer workshops to fill in any gaps.

**Phase 3**

*Launch*

As you approach go-live, prepare users to accept the change and ensure that they have all the required skills. Scale training with self-paced web-based training, and provide short, custom-made videos on the drivers for the transition, how the company and users will benefit, and what’s coming next. Supplement training with job aids such as step-by-step one-pagers on key processes and one-on-one or group coaching.

**Phase 4**

*Ongoing*

Conduct regular assessments and certifications of existing user skills over time, especially around upgrades. Provide advanced and expert training to build best practices and enable power users.
Optimize Day-to-Day Operations

A key decision in your move to BMC Helix is **whether to use a managed service**. In any BMC Helix transition, you’ll rely on our operations team to handle basic operational functionality like updates, patching, performance, vulnerability management, and hardware maintenance. On the administrative side, you have two options: continuing to perform tasks such as setting up users, handling incident and request tickets, sending reports, and so on—or **offloading these responsibilities** to a managed service.

**Why you might opt for a managed service**

The increasing change and complexity of IT calls for greater administrative resources. Many companies aren’t able to sustain the ongoing training their internal team would need to keep up. Others prefer to **shift their internal IT focus** to transformation and innovation rather than firefighting and maintaining service quality. A managed service approach can also **reduce risk** through more effective management, helping improve adoption and ROI.

**Engage successfully with a managed service provider**

As you make your selection, choose a managed service provider with deep experience and expertise with BMC Helix so you get resources with the right training and certifications. Getting the managed service directly from BMC also means having direct access to support, R&D, and product development resources that a third party might not have.

At the start of your engagement, **conduct due diligence** to make sure that what’s been discussed will actually be provided. Verify that the right resources have been engaged and that the environment has been configured correctly. **Set up service level agreement (SLAs) and quality levels** based on key metrics.

In the course of the transition to the managed service team from either your in-house team or the delivery team, it’s important to **track everything** that happens to manage risk, and make sure you’re getting what you’re supposed to.

**Governance** is critical for ongoing success. Meet regularly with the managed service provider to **review metrics** like ticket aging, performance, and others to make sure the KPIs outlined in the statement of work (SOW) are being met. **Collaborate with your provider** on your technology strategy and direction so you can continue to gain momentum toward your goals.
Measure and Report on Your Success

Achieving your goals for BMC Helix isn't automatic or accidental. It depends on specific and intentional execution against a well-defined success plan with clear objectives and a way to measure achievement according to relevant metrics. For example:

- If your objective is to improve service desk productivity through more consistent process execution, you should measure MTTR and first call resolution rate.

- If your objective is to achieve faster implementation of changes, you should measure end-to-end time to implement changes, change failure rates, and the number of incidents resulting from changes.

- If your objective is to improve user satisfaction, you should measure exploitation of self-service capabilities such as the number of requests generated by end users rather than the service desk, knowledge article ratings, service level target performance, and customer satisfaction surveys.

Defining these metrics in advance is essential. After all, if you can’t measure, you can’t manage, and if you don’t manage, you won’t achieve. Include both leading and lagging performance indicators. Your leading indicators will provide a prediction of your future service and process quality and effectiveness. For example, a downward trend on incident volumes and an upward trend on automated request fulfilment are leading indicators of service delivery improvement. Lagging Indicators will measure your current operational performance. An example of this would be the number of incidents by severity or a number of changes executed.

Work with us to understand which benefits you should be looking to exploit based on our experience with customers in similar circumstances. Build your success plan accordingly, then use it to track achievement. If measurement shows that you’re deviating from the plan, work with us to understand why, and how to get back on track.

Don’t try to achieve everything from day one. Establish targets for three to five outcomes for the first six months, evaluate your success, and then set goals for the next six months.

As you work with us to define success and how you’ll measure it, keep in mind the audience you’ll need to communicate with about that success, and be prepared to answer the “so what” question. This means being ready to answer the questions your business will ask in terms they’ll understand and consider relevant.
It’s Time to Transition

To make a successful move to BMC Helix, you need a strategy and execution plan that delivers results. That means:

- Having a clear understanding of your objectives, how they’ll be achieved, and how you’ll evaluate your ongoing progress and success.

- Enabling your staff to adopt and use the solution effectively, and investing in operational excellence.

- Understanding that success with BMC Helix isn’t an end state that you reach—it’s a level of execution that you work actively to maintain over time through training, measurement, learning, and an ongoing review of your results in light of your business needs and objectives.

By following the best practices outlined in this ebook, you can deliver optimal value for your business with BMC Helix.

**BMC Customer Success**

From core to cloud to edge, BMC delivers the software and services that enable over 10,000 global customers, including 84% of the Forbes Global 100 to run and reinvent their businesses. Our Customer Success portfolio offers services, consulting, education, and support to accelerate outcomes aligned to your business objectives and IT priorities so you can thrive in your ongoing evolution to an Autonomous Digital Enterprise.
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BMC—Run and Reinvent