

Release Management Services

SERVICES OVERVIEW

Remain Compliant With Vendor Release Cycles.



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Introduction

WHAT SETS OUR RELEASE MANAGEMENT SERVICES APART?

The primary purpose of our Release Management Services is to ensure seamless integration of vendor-released product upgrades into your production environment. Since software providers often release new versions or patches to enhance functionality, fix bugs, or respond to evolving market needs, swiftly integrating these updates into your production system while minimizing disruption is critical. However, without proper guidance and oversight, these upgrades can result in unforeseen issues affecting the performance and stability of your quote-to-cash system.

Staying current with vendor releases is critical to the health and supportability of your quote-to-cash system. Such updates often introduce enhancements, fortify security, and address known vulnerabilities, ensuring optimal system performance. Neglecting these updates exposes your system to threats and performance issues, potentially hampering business operations. Moreover, vendors typically provide support only for recent versions, which means outdated systems might miss out on essential assistance. To maintain operational excellence and ensure seamless support, prioritizing the application of the latest vendor releases is critical to the health of your production system.

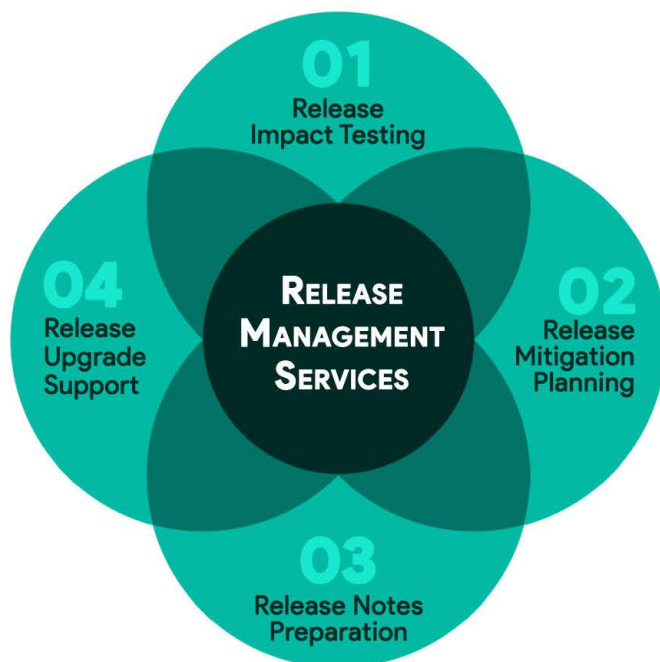
Our services offer a structured pathway for upgrades. The approach is threefold. Firstly, we ensure technical compatibility of the release with your solution, which means assessing the upgrade in the context of your unique system setup, ensuring no conflicts and a smooth transition. Secondly, we provide guidance on the operational implications of the upgrade, ensuring that your solution can effectively utilize the new features or changes. Finally, we offer hands-on technical support to apply the release to your system.

This whitepaper describes our firm's comprehensive approach to Release Management Services, a suite of services crafted to guide you seamlessly through every stage of vendor software releases. From the proactive forethought of release impact testing to the detailed diligence of upgrade execution, our services are a testament to our dedication to operational continuity in the ever-evolving landscape of quote-to-cash systems. Discover how our Release Management Services align with your support objectives, ensuring consistent service amidst technological evolution.

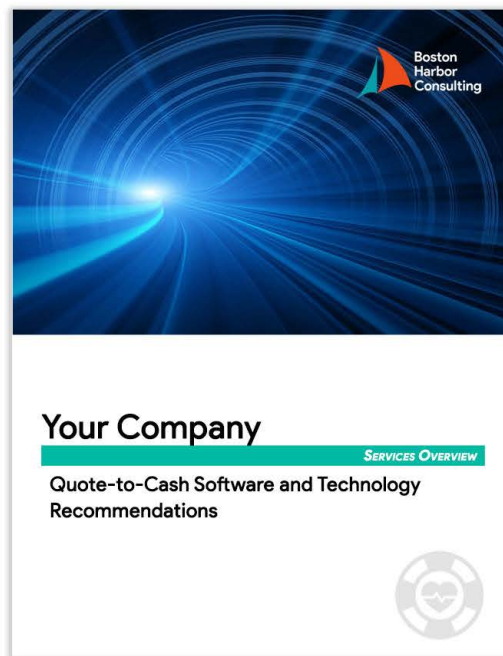


What's Included

KEY BENEFITS OF OUR SERVICE



SERVICE DELIVERABLE



SERVICE TASKS AND TIMELINE

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Project Kickoff	★							
Requirements Workshops								
Vendor Presentations								
Fit and Alignment Scoring								
Readout Preparation								
Project Readout								●



Release Impact Testing

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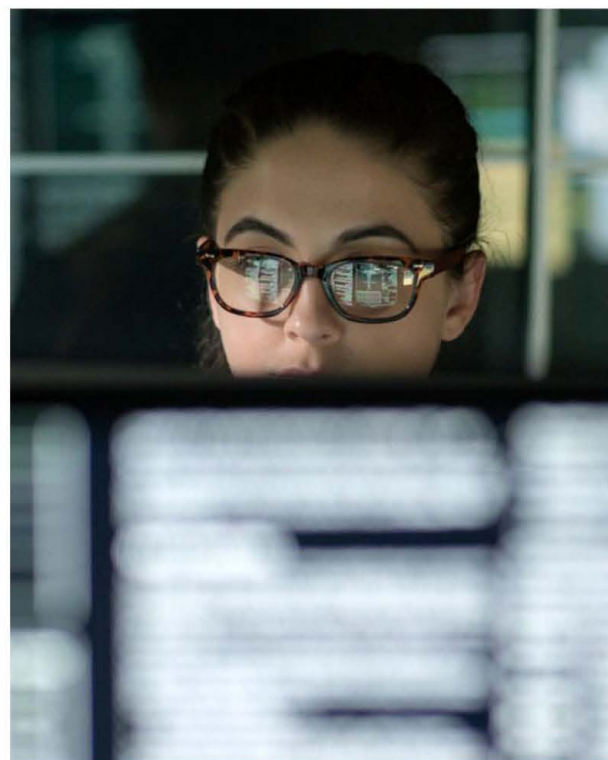
PREEMPTING CHANGE: SAFEGUARD CAPABILITIES WITH EARLY ANALYSIS

Quote-to-cash systems are often the backbone of an enterprise's sales operations. A minor hiccup can ripple through the processes, leading to customer and financial implications. As vendors roll out new features or changes, not every enhancement will naturally align with your system's customizations or unique implementation. Our Release Impact Testing is the necessary lens to clarify how these new variables might integrate with or disrupt your production system.

It's not just the overt, documented changes in a release that warrant scrutiny. Hidden pitfalls, or what some might dismiss as minor nuances, can prove the most disruptive. Such lurking shadows might escape a vendor's notice but potentially create operational chaos. Through thorough testing, we can surface these issues, addressing them before they escalate into larger, more costly problems. Furthermore, anticipation is a powerful tool in this arena. A proactive stance—understanding and preparing for the impact of a release before its integration—is invaluable. It's not just about identifying issues but about mapping out a strategy for their resolution. This foresight can drastically reduce downtime and ensure a smoother transition to newer system versions.

Lastly, the assurance that comes with Release Impact Testing cannot be understated. For stakeholders, knowing that a system is resilient to changes and that its performance post-release will remain optimal instills confidence. It becomes less about navigating the treacherous waters of technology evolution and more about harnessing its benefits for supportability and business growth.

As technology evolves, you cannot afford to be a passive recipient of vendor software releases. Our Release Management Services safeguard against potential disruptions, ensuring the smooth operation of your quote-to-cash system post-release.



Release Mitigation Planning

02

REDUCING DISRUPTION: FIND NEW APPROACHES TO PRESERVE CAPABILITIES

Once we've thoroughly assessed the impact of a pending release as part of our Release Impact Testing, our Managed Services team focuses on developing a detailed mitigation plan tailored to your unique environment. Our approach goes beyond merely identifying potential challenges; we work closely with your team to understand the intricacies of your solution design, business processes, and functionality to formulate a plan that aims not only to mitigate risk but also to ensure the smooth operation of the production environment post-release.

Every software system, particularly in the domain of quote-to-cash, is a living entity. Vendors frequently update their offerings, driven by market needs, technological advancements, or efficiency goals. However, the one-size-fits-all nature of these updates often overlooks the intricacies of individual implementations. Clients, over time, build customizations and enhancements onto the original software, making them vulnerable to subtle and significant disruptions when vendors roll out changes.

After the release impact testing is conducted, the magnitude of the effect of the release becomes known. Our team will analyze the interplay between the vendor's changes and your system's modifications as part of our Release Mitigation Planning. Our focus is twofold: preserve the integrity of the native functionality and safeguard the enhancements applied to your solution. Sometimes, this may require redesigning certain aspects of your system, ensuring it safely accommodates the vendor changes.

By helping you anticipate and prepare for changes, whether sudden modifications or upgrades planned for the coming months, we enable you to maintain business as usual, even when your software environment is anything but usual.





Release Notes Preparation

03

PLANNING MIGRATIONS: DOCUMENT UPGRADE TO IMPROVE PREDICTABILITY

After our Managed Services team completes the prerequisite release impact testing, we will draft and distribute the production system release notes. Staying informed and prepared for software upgrades is crucial, and the timely preparation of accurate release notes equips your team with clear, comprehensive, and actionable insights whenever your system changes due to vendor software releases.

Our approach is not just about documentation but about clarity and foresight. We carefully document pending changes, ensuring that you're never caught off-guard by adjustments made to the production environment. We detail what has been modified, enhanced, or added and, more critically, why it matters. By highlighting the impacts of these changes, we ensure you're equipped with the strategies to mitigate them.

Beyond the present, our team researches the future changes planned in upcoming releases, describing the ramifications of these vendor-announced changes to the underlying software. This forward-looking documentation allows your technical team to understand the immediate impact of the current release and strategically plan for what's ahead.

Consistent with our emphasis on providing holistic service, changes to your production system due to vendor releases are carefully integrated into the "as-built" solution documentation, ensuring that your records remain current and reliable.

Timely preparation and distribution of release notes detailing every system change and its implication provide you with not just a record but a roadmap, allowing your team to anticipate, adapt, and proceed confidently with the new release.





Release Upgrade Support

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STAYING CURRENT: REMAIN COMPLIANT WITH LATEST VENDOR RELEASES

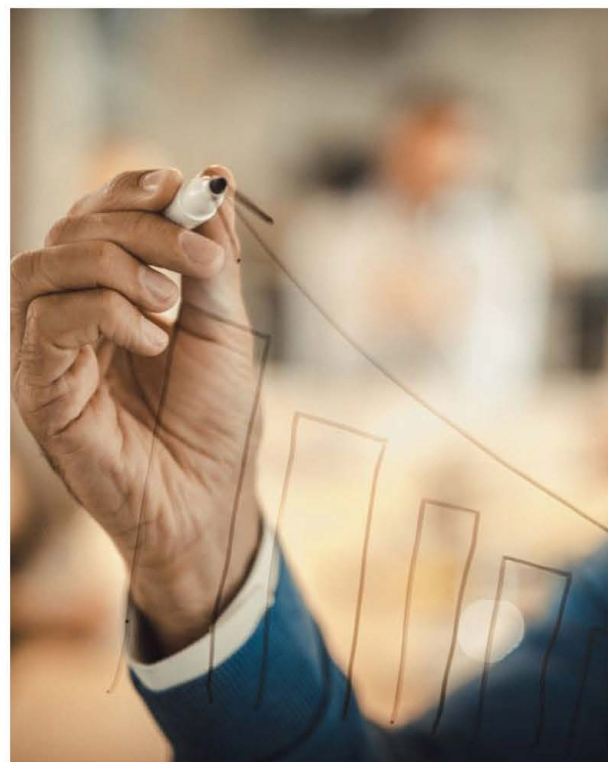
After aligning with your team on the release mitigation plans and documenting the release notes, the next step in our Release Management Services process is to apply the planned changes to the production environment in conjunction with the vendor release.

As part of the Release Upgrade Support, our Managed Services team will monitor the vendor release activities to ensure they occur as planned and at the prescribed time. Our team will apply the planned changes to the approved production release notes after the vendor upgrade. After applying the planned changes, our team undertakes post-release testing and verification of the production system. Our testing involves a careful examination to confirm both operational integrity and performance. Using a combination of targeted unit tests and broader regression testing, we seek to identify and rectify overt issues and any subtle discrepancies that may impede system functionality.

We have learned through experience that planned vendor releases can sometimes involve the rapid release of hotfixes. As part of the Release Upgrade Support services, our Managed Services team will continue to monitor the system to see if any hotfix is required. This continuous monitoring reaffirms our dedication to ensuring the stability and functionality of your system throughout the upgrade process.

Upon completing the upgrade process, our team provides notification that it is safe to resume system operation. And in the rare event that a rollback is necessary, we stand prepared to execute, ensuring the integrity and continuity of your operations.

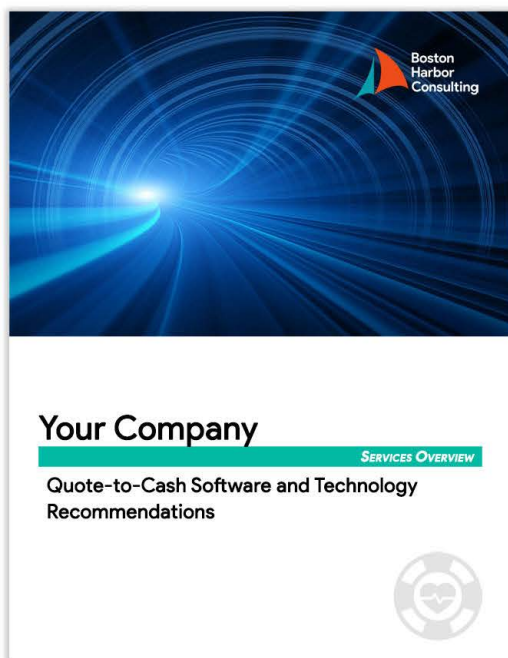
Our Release Management Services act as a protective buffer, ensuring your software upgrade is as smooth and hassle-free as possible.





Recommendations & Next Steps

WHAT YOU WILL RECEIVE AFTER THE ASSESSMENT



After our *Software Selection Rapid Assessment* engagement, we will provide you with our *Quote-to-Cash Software and Technology Recommendations* report. The document will summarize our findings with recommendations tailored to your enterprise's unique objectives. We will provide the vendor scorecard results and an evaluation of options detailing their alignment with your unique business processes. Additionally, the report will include a prioritized roadmap of suggested next steps and potential pitfalls or challenges to be aware of. Our objective is to equip you with a holistic, actionable blueprint that informs and empowers your team to move forward with clarity and confidence with your quote-to-cash initiative.

CONTACT US, AND TAKE THE NEXT STEP IN YOUR QUOTE-TO-CASH JOURNEY.

Navigating quote-to-cash software selection is no small feat. Throughout my tenure, I've witnessed many QTC implementation challenges and understand the significance of making the right software decision. But beyond the spreadsheets and systems, what truly resonates with me is the people: passionate professionals who are unwavering in their quest for excellence. If you are seeking a partner in this journey—a firm that values precision and personal touch—please consider reaching out at services@bostonharborconsulting.com. My team and I are here to listen, understand, and co-create a brilliant solution for you. Let's embark on this journey together and make the story of your organization's transformation one of enduring success.



Shalane Sheppard
Vice President, Services

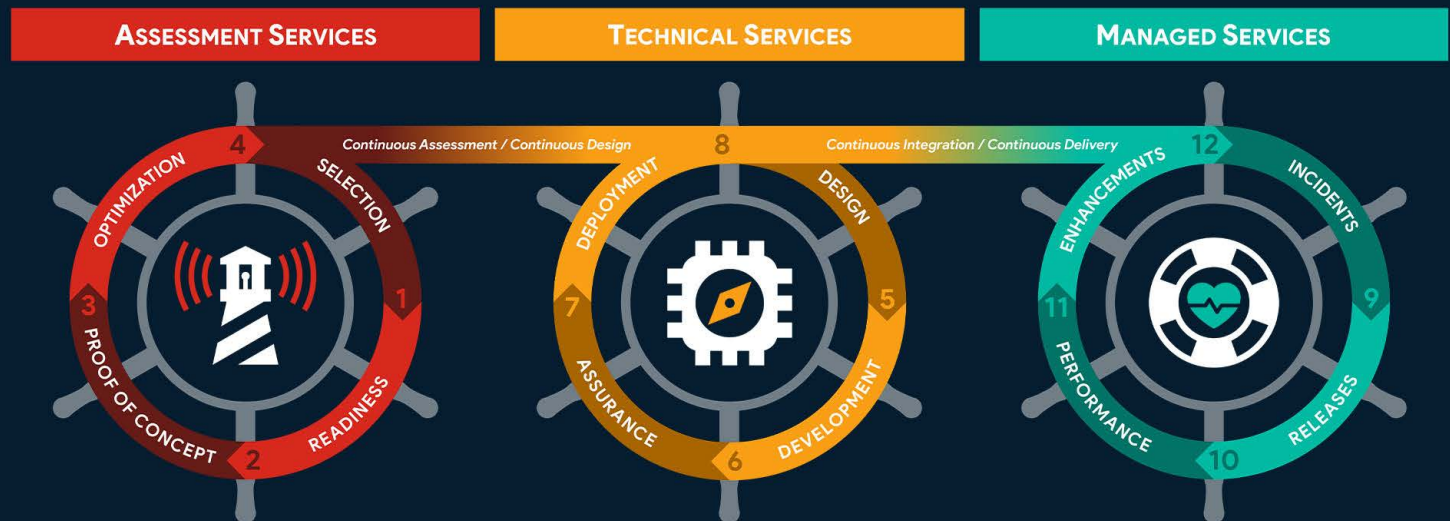
About Us



UNLOCKING SUCCESS IN SALES OPERATIONS: A JOURNEY WITH BOSTON HARBOR CONSULTING

With a rich history and a dedication to excellence, we have evolved into a trusted partner for organizations seeking transformative solutions in the quote-to-cash domain. Our story begins with a simple vision: to bridge the gap between business objectives and technical realities. In the dynamic landscape of Sales Operations, where efficiency, agility, and precision are paramount, we recognized the need for a partner who could seamlessly integrate technology and strategy. This realization fueled the inception of Boston Harbor Consulting, and our commitment to this vision has guided us ever since.

OUR COMPREHENSIVE SERVICE PORTFOLIO



OUR GUIDING PRINCIPLES: EXPERTISE AND INNOVATION

With over a decade of domain expertise in quote-to-cash solutions across various sectors and geographic regions, we know that true excellence lies in understanding the unique challenges and opportunities that each client brings to the table. Innovation is our driving force. We believe in the power of creative problem-solving and continually seek out innovative approaches to tackle complex challenges. Our specialization in SAP technology and low-code innovation ensures that we stay at the forefront of enterprise development. Innovation isn't just a buzzword for us; it's embedded in our DNA.

THE BOSTON HARBOR CONSULTING DIFFERENCE

Our distinction lies not only in what we do but in how we do it. We're not just a consulting firm; we're your partner in success. Our commitment to long-term growth, adaptable solutions, and unwavering support sets us apart. As you navigate the complexities of Sales Operations, choose Boston Harbor Consulting as your compass. Together, we'll embark on a journey of transformation, unlocking new horizons for your organization. Join us in shaping the future of Sales Operations. Welcome to Boston Harbor Consulting.

