FIVE STEPS TO GET YOUR MANAGED FILE TRANSFER PROJECT OFF THE GROUND

With Covid-19 allowing more "quality time" at home…and in my garage, I found myself in awe of all the stuff I've accumulated for home improvement projects left unfinished. Some were started - perhaps just enough to fix a problem knowing I was only buying time. But one project in particular was more ambitious – something I've wanted to do since the day we moved in. And since then the materials and I have sat – with a vision of how much my family would enjoy a new space. Especially now with social distancing, it's getting tougher and tougher to keep everyone entertained and our collective sanity intact. But I just couldn't wrap my head around how to start.

The next day at work, with excited thoughts of my rekindled project banging around in my head, I found myself talking to a valued customer who purchased our Managed File Transfer (MFT) software almost a year ago. Although still a priority, the project hadn't really started. This is not uncommon. I listened to the very understandable reasons holding up progress: urgent distractions, everyday ops, resource constraints, tactical fix-it projects, skillsets, knowledge, trepidation, and some fear of disruption thrown in for good measure. I was secretly amused as I realized these were the exact same reasons I myself had for not starting my own project. I thought I'd share with you the advice I shared with them in hopes of perhaps inspiring other MFT projects off the ground.

Five Steps to Realizing Effective MFT

We all know that getting started is the hardest part. I said to my customer "start easy but start now." Here's what we laid out for our customer: a methodical, phased approach enabling a confident ease into action without disruption and full control of the program all the way to completion. By following

these five steps, your MFT project will go from daunting to done:

1. **Step 1 – Assessment.** A thorough understanding of current state is critical to understanding the desired future state and how to get there. Identify a cross-functional team of subject matter experts with intimate knowledge of the estate and take inventory of every "file transfer exchange pattern". This is not a record of every file transfer – that comes later. Rather, this is the recognition of repeated file transfer patterns. For example: detect large file on Unix system, perform integration processing (e.g., compression, encryption, renaming, etc.), send to a trading partner or cloud service, and notify the source application. Be sure to look at file transfer as a step within a broader business process and understand how it's orchestrated. Take note of reoccurring issues, gaps, and requests/needs of constituents that cannot be easily addressed today (e.g., the Dev Team).

2. **Step 2 – Get Smart.** Technology evolves and so does software. You can read all you want, but you'll never grasp the practical applications and nuances of either unless you get your hands dirty. But how do you start when don't even know what you don't know? Bring in a consultant (e.g., BMC Customer Success) to quickly stand up a DEV environment, fast track some product orientation, and learn best practices. This is not about giving up ownership or relegating responsibilities. This is about focus and knowledge transfer from a professional who knows what works based on experience. It will pay for itself in terms of productivity and the confidence your team will gain is invaluable. The other benefit of bringing in help early is that, with a core understanding of your current state and objectives, they'll be able to pitch in on later stages when you want to accelerate portions of the project.

3. **Step 3 – Planning.** Finally, with full situational awareness and practical knowledge, you can confidently architect and engineer a solution that:
   - Provides standard designs for common Exchange Patterns;
   - Accommodates growth in the business;
   - Solves compliance issues;
   - Addresses Operational inefficiencies;
   - Enables delegated administration and user self-service
   - Takes advantage of everything a new generation of MFT solution has to offer; and
   - Rolls out new capabilities to effectively support next-generation business applications.

   And with your services consultant already aware of your current state, getting some independent eyes at this critical stage to participate in the process or at least review it would again pay dividends. This is how you develop your blueprint for the future. Take it seriously.

4. **Step 4 – Preparation.** With a knowledgeable team and future state defined, now is the time to assess the entire project scope and create your plan. Break the project into finite chunks aligned to prioritized business objectives. We'd recommend prioritizing some less risky quick-wins and, honestly, a politically popular project or two even if the business value isn't that high. It's important to set yourself up for success by demonstrating a regular cadence of progress. It keeps morale and energy high. We would also define some projects that could potentially be outsourced to your services consultant – at this point, they're already up to speed and can knock out some wins without disrupting your core team.

5. **Step 5 – Execution.** With all the planning and preparation in place, this is when the deployment of your new MFT platform and migration off your legacy actually starts. This should arguably be the easiest stage. Just follow the plan, right? We all know this is where the usual mix of daily distractions will continue to creep up. Obviously, the platform won't stand itself up and migrations won't magically happen on their own. So in addition to naming the usual Platform

Owner and Migration Project Manager, we recommend designating a Technical Lead responsible for and dedicated to each sub-project in your plan. Not only does this focus lead to success, it's also an opportunity for individuals and management alike to shine and be recognized. Perhaps even introduce some healthy competition. And by the way, don't forget about your services consultant. With your carefully drawn blueprint and plan defined above, it will be much easier to realize the business justification for augmenting your team to tackle certain segments of the project.

I shared the success a similar customer had with using a services provider. A European Manufacturing Company I was working with decided to move off a homegrown solution to Control-M Managed File Transfer. After continual file transfer issues resulting in significant business disruption, they had dedicated two full-time staff: one to chase problems and the other to manually verify transfers. They were struggling. With some focused guidance from their services provider, they were able to quickly deploy and successfully transition to Control-M MFT enabling them to refocus their resources on more innovative projects.

As you can see, sometimes efforts like implementing MFT need a little help to get off the ground much like home improvement projects. Incorporating a trusted advisor brings you many benefits including industry expertise on the technology and best practices, a fresh perspective, and a pool of talent you can draw from to augment the core team. By following the five steps above with your trusted service provider, your next-generation MFT platform will be off the ground, ROI captured, and dividends headed back to the business in no-time.

If you would like help with getting your Control-M MFT project off the ground, please fill out our form and an expert will reach out to get started.