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Needs Assessment Checklist

Start your modernization journey with a basic needs assessment to understand the current state of your legacy applications.

TIP!
Complete an internal survey

OpenText recommends surveying employees on how they are using your legacy application to capture:

- Real-life use cases and challenges
- Employee satisfaction and experience with the system
- Areas where improvements will have the greatest impact
- How employees prefer to work to optimize productivity

Which department(s) currently use Hyland?
Notes

How is it being used?
Notes

In what business processes is Hyland integrated?
Notes

What type of documents are stored and managed within Hyland?
Notes

How many years has your business been using Hyland?
Notes

When did you last upgrade the Hyland system, including any new integrated technologies?
Notes

What is the current total number of users on your Hyland system?
Notes

What functionality in your Hyland system does your business currently rely on?
Notes

What functionality, if any, do you feel is currently missing from your Hyland system?
Notes

Are your employees satisfied with the current user experience of Hyland?
Notes

Do you need a plan for moving to the cloud?
Notes

Will you need to do a full or partial migration of content and data from your existing system?
Notes

When will you need to or want to retire your Hyland system?
Notes

Will you need any integrations or customizations to better enable your existing or desired business processes?
Notes

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