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Options for modern customer communication

CCM migration as an opportunity

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The challenge of CCM migration

Replacing a CCM system is a complex project, especially the migration of existing templates, which often number in the thousands.

There are various reasons for migrating:

- Discontinuation of the previous solution
- The previous system no longer meets the current requirements in terms of technology, performance, etc.

In both cases, the Serie M/ is a good choice. Not only does it offer a wide scope of services with many advantages right from the start, but we at kwsoft® also provide efficient support throughout the entire migration process with our consultants and highly specialized partner companies. In particular, our sophisticated, semi-automated resource migration, including a reliable effort forecast in advance, which we offer in cooperation with semantics, is unique in the market in this form.

Implementing a new CCM: your options

Depending on whether you are replacing your CCM system for your own reasons or are affected by a discontinuation, there are various approaches to implementing a new software solution. How you proceed in concrete terms, whether you have your resources analyzed in advance, which optimization measures you implement immediately and which capacities you make available for the migration and when, depends on the acute requirements and your IT strategy. In this respect, the following approaches represent basic patterns that can be variably combined and prioritized.

Approach 1: Ensure ongoing operations with foreseeable expenditure

This scenario essentially involves a 1:1 migration to ensure ongoing operations. Upstream and downstream processes and systems remain in place and are connected via interfaces. This approach is the obvious choice if the previous product has been discontinued and a new, viable solution needs to be established quickly. The immediate advantages: The initial effort required is limited and there is no unnecessary time pressure due to the end of support.

The Serie M/ offers the following advantages even as an "entry-level solution":

- **Consistent, conversion-free document processes** from creation to output based on a single, format-neutral base document. It combines content, layout specifications and metadata from the point of creation and thus enables maximum flexibility regarding the output channel.
- **Greater efficiency and agility in document creation** thanks to centralized resource maintenance in our design and administration environment M/Workbench. This allows your administrators and editors to design and control document processes from content composition to output processes using a single tool based on the declarative principle.
- **Flexible data transfer from your business applications** and assignment to the templates and modules through intelligent mapping.
- WYSIWYG editor for **high user acceptance**.

- **High-performance batch and background processing** with manageable hardware requirements saves costs. With the M/TEXT batch processor, for example, it is possible to define parallel processing processes (threads) with a fixed number of documents. This allows the performance to be individually adapted and optimized to the framework conditions of the respective application. In addition, the Serie M/ is technically based on a middleware or container architecture respectively, which opens further possibilities for software and hardware-based scaling.
- Operate our solution **on-premises, in the cloud or use a SaaS offering**. The choice is yours.
- You can test the latest release of the Serie M/ in a **cloud test environment** with a server location in Germany with your settings, resources, etc.

Approach 2: CCM migration as an opportunity for optimization and a step into the future

In this scenario, you redesign your CCM processes with a broader scope. This will not only make your company's customer communication fit for current requirements but also for future ones: in terms of covering all output media, digitalization, quality of communication, consolidation of your IT landscape, etc. Always in line with your IT strategy and your time and resource planning.

The effort necessary in such a migration is worthwhile if you take advantage of the future opportunities that present themselves.

Your options with the Serie M/:

- Use all analog and digital channels of your customer communication professionally as part of an **omnichannel approach**. This means that your content always reaches your customers in the right format, in the right layout and via the desired channel.
- **Shorten your time-to-market** with an optimized solution with high adaptability and efficient template development. This is ensured by the M/Workbench and, above all, our M/TEXT TONIC Content Hub, which connects the business world with the IT world. In this editing system, technical editors and specialists can create resources themselves — within the framework of a precisely defined authorization system — which are then used in customer communication. The system is operated via the easy-to-understand M/TEXT Editor.
- The Serie M/ is designed as an **enterprise solution** that can be used to eliminate historically grown isolated solutions and thus consolidate IT landscapes. If existing solutions need to be retained, the Serie M/ offers you the option of integrating their output so that these documents are also processed centrally by the OMS.

Resource migration made easy

Reliable effort forecast

A key issue for companies introducing a new CCM system is the migration of their existing resources. Often several thousand templates or modules, including logic, must be transferred from one system to another. A challenge that may seem unmanageable. But it does not have to stay that way.

kwsoft® brings light into this black box — and concrete figures into the project plan — with the help of an editorial system (the so-called Library Manager) developed over many years by our partner company semantics. Based on an automated analysis of your resources, we create a reliable effort forecast for your template migration in advance. You will then know exactly what to expect and be spared unpleasant surprises.

To do this, all templates are imported into the semantics Library Manager and analyzed and evaluated in terms of their structure and content (content with and without logic, calculations, variables, dialogs, layout, etc.): Based on the frequency and complexity of each phenomenon in the inventory, the required effort for the framework and content migration is calculated on a well-founded basis. In this way, we work together to find the right migration path for you.

Semi-automated migration

Not only do we precisely analyze the required effort but also minimize it with the help of the Library Manager: experience from previous projects has shown that we can automatically migrate an average of 80 percent of each template directly into the prepared framework (consisting of layout, data models, system control, etc.). This transformation works for numerous source formats and source systems, such as DOPiX, MS Word/winBK, ASF/DCF and Papyrus. And the system learns with each additional migrated template.

The result of this migration is M/TEXT TONIC code of the Serie M/ with formatting, text, content, logic and dialogs that can be used immediately and will also be easy to maintain in the future. An enormous saving. We or our partner companies are also happy to provide personnel resources for the final check according to your specific requirements. This will help you to overcome the migration hurdle.

The better the specialist department knows its requirements and can describe the desired result, the more efficiently the migration will work. This is the basis both for the configuration of the new framework and for the semi-automatic migration of the actual content by semantics.

Here are a few examples of savings we have achieved with major insurers and statutory health insurance companies (rounded figures):

Migration	Number of templates, sets of rules / modules, sub-templates	Manual migration in person days	Rework semi-automatic migration in person days	Savings in manual effort (in percent)
winBK (Word) to TONIC	2400/2100	3900	530	86
Papyrus to TONIC	2300/17800	2750	310	89
DOPiX to TONIC	2500/29400	4750	920	80
DOPiX to TONIC	5200/37000	5170	500	90
DOPiX to TONIC	2000/33000	3500	520	85

On the market only we can offer you such a differentiated and reliable effort analysis with a semi-automated migration of such quality. The savings compared to purely manual migration can be up to 90 percent, depending on the source system. A major economic advantage in your migration project.

How we manage migration projects

If you need support for your migration in the form of consulting services for strategy, project management, product, architecture, resource reworking, etc., our consulting team is at your side with proven expertise. We are supported by our top-class network of certified technology and project partners with additional capacities, specialist knowledge and out-of-the-box solutions. You therefore have a flexibly scalable contingent of experts at your disposal for all upcoming tasks.

Our specific project approach is based on modern classic and agile project management methods: We manage our projects in line with well-known international standards such as IPMA, PMI and Scrum. We combine these with a standardized procedure in the project process that we have optimized over many years and many migration projects. The established and proven project tools ensure the successful and effective implementation of your migration. Traditional learning phases in the project management and the content-related work packages are therefore avoided. Managing the implementation of the Serie M/ has been our daily business for more than 40 years.

A joint initialization workshop sets the essential course and defines the goals, structure and organization of the project. Our differentiated project schedule with clear and proven steps, continuous stakeholder and risk management, and effective controlling ensures the project's success.

The standardized project process:

- In the proof of concept, we work with you to ensure that the critical requirements, the architectures, the necessary use cases and the stakeholder and user acceptance are guaranteed.
- During project initialization, we lay the foundation for implementation. We define the necessary project artifacts, analyze the stakeholders and required resources and set up risk management and controlling, among other things.

- In the scoping phase, we use our standards to create rough concepts, define functional and technical solutions for product integration and place a key focus on analyzing your existing resources.
- In the implementation phase, the product is installed, integrated into your system landscape and the functional and technically supported template migration takes place. The last step is the rollout and introduction of the Serie M/ in your company, including the necessary training and multiplier concepts.

Summary and conclusion

Every change to a central software solution is a challenge. When you choose the Serie M/ from kwsoft® as your CCM system of the future, you not only get the technologically leading solution on the market but also proven, efficient project management. Thanks to our partner semantics, template migration also becomes a manageable affair.

We stand for continuity: because we have been making CCM software exclusively for over 40 years — today, tomorrow and the day after tomorrow. This also ensures that your future CCM solution is always technically up to date. Accordingly, we have long customer relationships.

We are looking forward to being your contact for CCM and barrier-free customer communication at marketing@kwsoft.de.

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We would be pleased to receive further suggestions or comments.

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