



Optimization Before Replacement

A decision worksheet for determining whether a frustrating system should be configured, integrated, trained, governed - or actually replaced.

Replacement is sometimes necessary. But replacing a system before identifying the source of the problem can move the same friction into a newer, more expensive platform.

1. Define the Problem

- Can we state the problem in operational terms rather than saying the system is "bad"?
- Who experiences the problem, how often, and in which workflow step?
- What measurable outcome would tell us the problem is actually solved?
- Is the problem caused by the technology, the process, the configuration, the policy, the training, or some combination?

2. Test the Current System

- Have we confirmed whether the needed capability already exists but is unused or misconfigured?
- Have current workflows been reviewed against recommended or simpler workflows?
- Are interfaces, templates, permissions, defaults, alerts, queues, and automation rules configured intentionally?
- Have we asked the vendor for a focused optimization review rather than a generic support call?

3. Examine Adoption & Governance

- Do staff know the intended workflow and receive practical role-based training?
- Are local workarounds undermining the system even when the technology is functioning as designed?
- Is there a clear owner for configuration decisions, enhancement requests, and issue prioritization?
- Are problems being categorized and measured, or simply collected as complaints?

4. Quantify Replacement Cost

- Have we included migration, interfaces, testing, staff time, training, downtime risk, and temporary productivity loss?
- What capabilities will be lost or need to be rebuilt during the transition?
- What contracts, notice periods, or overlapping subscription costs will apply?
- What is the operational risk if the replacement takes longer than expected?

5. Make the Decision

- Optimize when the system can meet the business need with reasonable configuration, workflow, integration, or adoption changes.
- Replace when there is a documented capability gap, unacceptable risk, unsustainable cost, poor vendor viability, or a business requirement the current system cannot reasonably meet.
- Defer when the problem is not yet defined well enough to justify the disruption and cost of replacement.

Quick Decision Record

Issue	Evidence	Decision
		■ Optimize ■ Replace ■ Defer
		■ Optimize ■ Replace ■ Defer
		■ Optimize ■ Replace ■ Defer

If you choose OPTIMIZE

Define the configuration, workflow, integration, training, or governance changes required. Assign an owner, target date, and measurable outcome.

If you choose REPLACE

Document the capability gap, total transition cost, migration and integration plan, vendor exit terms, and the business outcome the new platform must achieve.

The goal is not to keep old technology forever. The goal is to make a disciplined decision based on practice objectives, operational evidence, risk, and total value - not frustration alone.

Decision checkpoint: Before signing a replacement contract, confirm that the problem statement and success measures are still the same ones that initiated the review.

Decision Notes
