

Successful Strategies for Deploying Desktop Change

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Tech Be Nimble, Tech Be Quick

- Volume of applications in today's workplace
- Pace of version upgrades
- Range of access
- Applications are not silos
- Concurrent engineering / upgrades / deployments
- Successful IT Departments **MUST** make it happen quickly and they **MUST** get it right

Strategy 1: Use Smarter Deployment Tools

MDT

SCCM

Prism

Altiris

Scripting

Wise



Smarter Migration of User Data

Microsoft USMT

- In Place Migrations
- Stores User Data on Hard Drive
- Customizable

Flex Profiles

- Operational Tool for Maintaining User Settings/Data
- Customizable
- Consistent User experience

Migration Up and Migration Down

- Customized Scripts to use during deployment

Strategy 2: Hold Out for a Hero...or Two

Finding Mr./Mrs. Right

- Executive Leadership
 - Communicates Vision
 - Influence
 - Active Involvement
- Funding
- Protection

Sponsors Are Like Shoes: More is More*

- Which people, groups or offices are impacted?
- The “ripple effect” – desktop change isn’t *just* about applications...it’s about training and workflows and....
- Who has the authority to implement change?
- Who is committed to seeing the change through to completion?

*This title does not necessarily reflect the views of *all* of the panelists. Namely, Mac.

Focus on Focus Groups

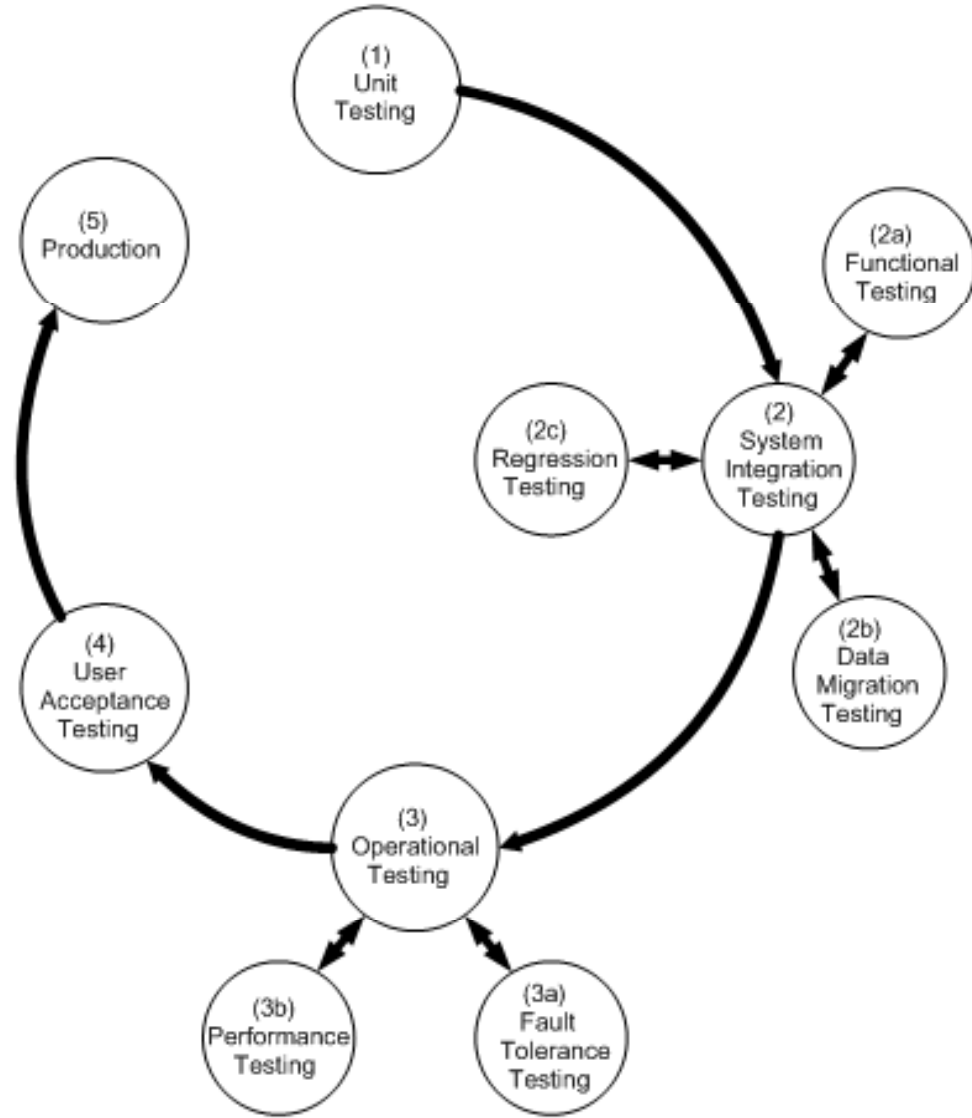
- Lay out the commitment you are asking for from participants – it takes time to plan, meet, review and approve
- Include diverse members from the same practice group or job role
- Remember: the Focus Groups *speaks* and IT *listens*

Strategy 3: Figure Out What's Going to Break...*Before* You Break It on 200 Desktops

No Application is an Island

- The Christmas Tree Effect
- Microsoft 2010 Suite seeks to further integrate all the products – applications are not silos
- Not everyone uses the same applications

- A "simple" upgrade to IE8
 - Surfaced over 100 applications and websites necessary for workflow, along with an additional 60+ eFiling sites
- A "typical" upgrade to Office 2007
 - Except...Elite Enterprise doesn't work



Testing, Testing...

A	B	C	D	E	F	G	H	I
Test Type	Category	Test Case	Expected Results	Special Requirements	Outlook - Pass	Outlook - Fail	IE - Pass	IE - Fail
Test Pass Data	Tester	Vivian Kreider						
Test Pass Data	Workstation	labwks001						
Test Pass Data	Date, Time	3/9/2010						
Test Pass Data	Duration (hrs)							

1 **Test Type**

- Sort Ascending
- Sort Descending
- (All)
- (Top 10...)
- (Custom...)
- 2-functional
- 2-functional - NEW
- 2-functional - UPDATED
- Test Pass Data
- Test Pass ISSUE
- (Blanks)
- (NonBlanks)

Category

- Archive data
- Date, Time
- Duration (hrs)
- EWA - 1General
- EWA - 2Options
- EWA - 3Retrieve
- EWA - 4Restore
- EWA - 5Delete
- EWA - 7Search
- EWA - 8Pairings
- EWA - Browse
- EWA - Search
- IE8
- Log Off
- Test Data
- Test Data: Multiple File A
- Tester
- Use "Y" in folder name
- Use "Y" in folder name
- Workstation

Strategy 4: Use Just Enough Process

Structure Without Strangulation

- The work is the most important element
- **Tool:** Departmental Project Template
 - Defines what's in AND out of scope
 - Provides the players and target dates
 - Sets clear expectations from the git-go, but leaves room for development (and doesn't take seven weeks to complete)

Project Details

For Management Use Only:

Approved **Under Discussion** **Deferred** **Closed**

Comments: (Sponsor – if proposal is deferred, please provide short explanation.)

Project Sponsor:		Project Driver:	
Target Completion: <i>(required)</i>			

Project Overview

Project Objective:

Users impacted by this project:

Project Scope

In Scope:

-

Out of Scope:

-

Outcome/Deliverables/Artifacts:

Staff Resource Requirements

Resource Name (if known)	Skill Set Required	Estimated Hours <i>(required field)</i>

Materials Resource Requirements

Materials	Estimated Cost <i>(required field)</i>

The Plan

Milestone and Schedule Commitment: <ul style="list-style-type: none">▪▪▪



Strategy 5: Know the Unknowable...or at Least Plan for It

Role with It

- Define an SME role...and let them be the SME
- Define a Project Manager role to administer project
- Define a Tech Writer role focused on end user communication & documentation
- Define a QA role to confirm expected behavior of the product and proof the technical documentation

PM without a PMO

- Sharing information
- Documenting processes & change
- Information should be shared to the team...and that includes your Sponsor(s) and your Implementation Partner

Test Project Kraft & Kennedy, Inc.

- Overview
- Messages
- To-Dos
- Milestones
- Writeboards
- Chat

People & Permissions Search



Project overview & activity

[New message](#) | [New to-do list](#) | [New milestone](#)

TODAY

- Milestone [Project Initiation and Planning](#) Assigned to Patricia M.
- To-do Hardware - Submit order for new hardware [List](#) Assigned to Kraft & Kennedy, Inc.
- To-do Project Initiation - Establish Basecamp site for project [List](#) Assigned to Patricia M.
- To-do OS - determine 32bit or 64bit OS. [List](#) Assigned to John S.
- To-do Office 2010 - finalize configuration and settings [List](#) Assigned to John S.

TUESDAY, 29 JUNE 2010

- Writeboard [Issues List](#) Added by Patricia M.
- Comment [Re: We need to have more assistance in the design phase](#) Posted by Patricia M.
- Message [We need to have more assistance in the design phase](#) Posted by Patricia M.

Stay up to date on this project

[Turn on email updates](#) to receive a daily digest notifying you of any to-do items or milestones that were added or completed in the last day.

[Project RSS feed](#) (What's RSS?)

People on this project

Kraft & Kennedy, Inc.

Patricia Mansuy
You are logged in right now

John Smith
Hasn't logged in recently

Managed with Basecamp



go to **pmansuy's workspace** Your free trial has ended | [buy now](#) **liquid** PLANNER™

dashboard plan collaborate analyze trash search members settings [help](#) | [report a bug](#) | [sign out](#) | [pmansuy](#)

schedule detail sheet help guide

add [navigation icons] actions [dropdown] all owners [dropdown] all folders [dropdown] all tasklists [dropdown] active items ... [dropdown] weeks [dropdown]

Prioritized Tasklists	Owner	Remaining Effort	hours	8/4	8/9	8/16	8/23
pmansuy's workspace	pmansuy	[3503h - 3503h]	3503h				
Import 01/17/10 11:16 AM	pmansuy	[3503h - 3503h]	3503h				
Office 2007 and Windows 7 Implementation Project P	unassigned	[874h - 874h]	874h				
Planning and Design	unassigned	[85h - 85h]	85h				
Build	unassigned	[582h - 582h]	582h				
Training Planning & Curriculum Development	unassigned	[332h - 332h]	332h				
Pilot	unassigned	[334h - 334h]	334h				
Rollout, User Training & Support	unassigned	[1200h - 1200h]	1200h				
Ongoing Project Management	unassigned	[95.51h - 95.51h]	95.51h				
Closeout	unassigned	[0h - 0h]	0h				

edit item [dropdown] [Getting Started](#) | [Support](#) | [Feedback](#) | [Report a Bug](#) | [Forums](#) | [Terms of Service](#) | [Security Policy](#) | [Privacy Policy](#)

Objectives			Major Tasks	Project Completed By: 07/23/10																			Owner / Priority (RACI)								
●	●	●	1 Project Initiation	●																					C	C	R	A	I		
			2 Project Planning	●																					R	R	C	A	R		
●			3 Proof of Concept Development		●																				R	R	R	A	R		
●			4 Packaging and Deployment Strategy			●																			R	R	R	A	R		
			5 Design																												
●	●		6 Windows 7 Planning and Strategy			●	●																		R	R	I	A	R		
●	●		7 Office 2007 Planning and Strategy			●	●																		R	R	I	A	R		
●	●		8 Review and Analyze Secondary Applications					○	○																R	R	I	A	R		
●			9 Migration Strategy					○																	R	R	I	A	R		
			10 Image Build																												
●	●	●	11 OS Installation and Configuration					○	●	●															R	R	I	A	R		
●	●	●	12 Printer Select Tool Revision					○	○	○															R	R	I	A	R		
●	●	●	13 Build and Deploy Core Applications					○	○	○															R	R	I	A	R		
●	●	●	14 Legal MacPac Customization			□	□	□	□	□															R	R	I	A	R		
●	●	●	15 Build and Deploy Secondary Applications					○	○	○															R	R	I	A	R		
●	●	●	16 Quality Assurance of Install and Configure					○	○	○															R	R	I	A	R		
		●	17 WTS - Install new image in Remote Access Environment																						R	R	I	A	R		
		●	18 Upgrade Domain Controllers to Windows 2008 R2																												
●	●	●	19 Training Planning and Curriculum Development			●	●	○	○	○																	I	A	R		
●	●	●	20 User Adoption Planning					○	○	○																	I	A	R		
●	●	●	21 Pre-Pilot Testing																						R	R	I	A	R		
●	●	●	22 Pilot Testing																						R	R	I	A	R		
●	●	●	23 Rollout, User Training and Support																						R	R	I	A	R		
●	●	●	24 Ongoing Project Management			●	●	○	○	○															R	R	R	A	R		
		●	25 Project Closeout																						R	R	R	A	R		
Faster Logon, More Efficient Desktop Simplify Software Distribution Increase Security Successful Project Completion Migrate Domain Controllers to Windows 2008 R2 Windows Terminal Services Upgrade	A	Kraft Kennedy																													
	B	Arent Fox																													
	C	3rd Party Vendor or Performance																													
	# People working on the project:			4	4	14	14	15																							
	Major Tasks			Target Dates	Week 01	Week 02	Week 03	Week 04	Week 05	Week 06	Week 07	Week 08	Week 09	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20	Week 21	Week 22	C. Wilson	A. Saleem	O. Parkin	P. Mansuety	Firm Staff
	Objectives			Costs	Capital	0																									
Summary & Forecast				Kraft Kennedy			58																	225							
				Training			3		8																						

The project started on January 11, 2010 and is scheduled to complete on or about July 23, 2010.
The project schedule has been negatively impacted by 5 snow days which closed the Firm office. The opening of the Tampa office has impacted schedule. The addition of new attorneys in the LA office has impacted schedule.

Ready, Set...Now Wait for Your Vendor

- Implementation vendors
- Application vendors

What Happens in Vegas *Shouldn't* Stay in Vegas

- Only a fraction of subscribers actually post to eGroups
- Search the eGroup archives
- Email posters directly and/or ask for introductions to resources
- Search for white papers or recorded webinars
- Watch webinars with your team

Strategy 6: Tackle the “Soylent Green” Issues

Soylent Green: It's People!*



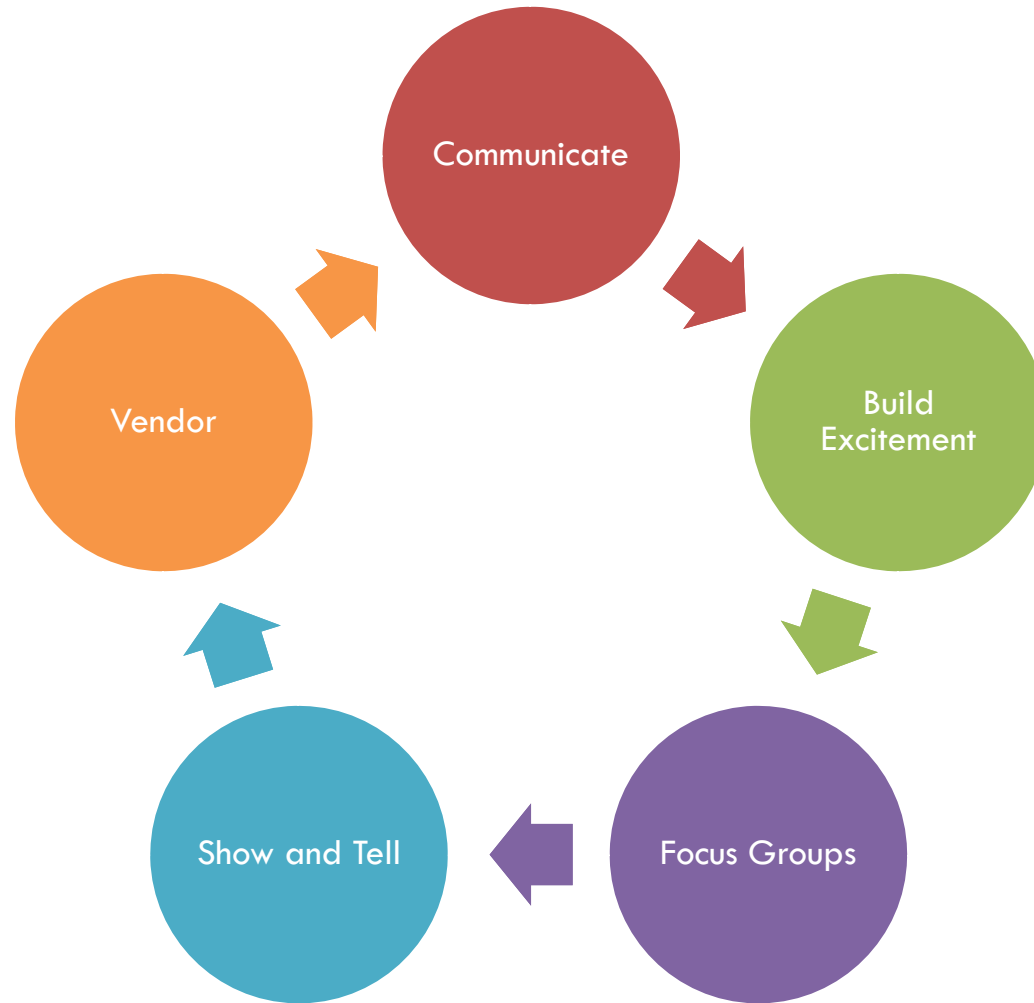
*For you youngsters, this is a reference to the 1973 Charlton Heston cult classic movie

I Say “Potato” and You Say “Knowledge Management”

- Setting & communicating the *right* expectations
 - Sponsors
 - Customers
 - Internal Team
- Scope
- Flexibility

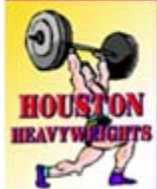
I Say “Knowledge Management” and You Hear “Potato”

- Use consistent vocabulary
 - “Universal” search
 - Knowledge Management
- Keep people informed of changes along the way, both within the department and the broader user community



Training: Let's Get Personal

- Is it about training, or is it about adoption?
- Can you get the *right* people into classrooms?
- Get 'em wherever you can
- Walkarounds
- Attorney meetings
- "I like" feature checklists (tip o' the hat to Traveling Coaches)
- Leverage the people who have the most contact with attorneys



You are invited to the

FileSite Survival Camp – FastTrack to the Future.

Camp members will enjoy individual and team competitive events such as e-Learning courses, FileSite Adventure Training, and FileSite deployment.

Stay tuned, more info to follow...

Camp Sites:

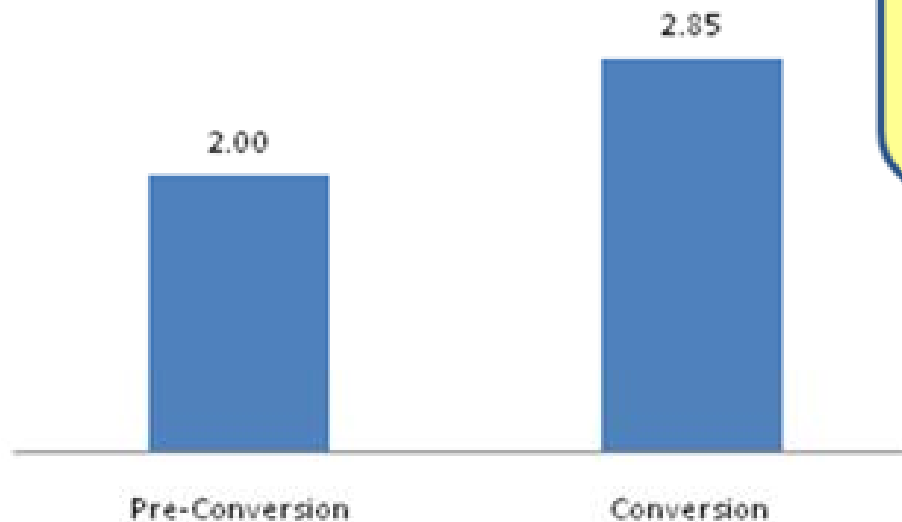
Austin All Stars, Dallas Dynamites, Denver Daredevils, Houston Heavyweights, Los Angeles Lightning Bolts, Minneapolis Musketeers, New York Knights, San Antonio Special Forces, St. Louis Spitfires and Washington Warriors

Camp Dates:

Aug 7 - Sept 7, 2007

Support Planning: *The Sky Might Be Falling*

**Average Tickets Per User
Per Month**



**Volume increases
42.5%**

It's Like A Marriage?

- Long term relationship
- Provide the Firm's vision and mission for IT
- Sense of Firm culture
- Open to new ideas
- Be available
- Communication
- Reasonable Goals
- Stay Involved

Q&A