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Upgrading the Desktop Environment
Shouldn't this be easy by now?

Users are increasingly demanding more from corporate IT departments. Workplace cultural changes, such as a push towards flexible working practices, require mobile and scalable technology. The increasing availability and capabilities of consumer technologies are also driving demands for more power and user friendly design.

With this increased focus on flexibility and user-centricity, many organisations have established projects to transform end user computing. The end of support life for still-prevalent technologies like Windows XP and Windows Server 2003 has also been a pressing catalyst for these projects. However, despite the common nature of these projects, most organisations still stumble when it comes to executing them. **This is often because they mistakenly assume that a common project must be a simple project.**

In reality though, End User Computing projects hide considerable complexity, for reasons including:

• Existing application landscape and remediation requirements
• User-installed applications and data
• Infrastructure, Operating System and application security considerations
• Changing ways of working, including a move towards user mobility and Bring Your Own Device (BYOD)
• A shift to cloud-based applications
• Business desires for less standardised configurations

Don't make the mistake of underestimating this complexity:

• **Understand the device and application landscape**. End user computing projects often face an onslaught of compatibility issues with existing hardware and software. This is particularly true in de-centralised IT environments, organisations where shadow IT is prevalent, or in organisations with immature configuration management. Dedicating resources early on to catalogue the environment is critical to understanding the scale of potential compatibility issues. Tracking software usage during the discovery phase also presents opportunities for simplification of the migration and overall licence cost reduction.

• **Leverage standardised configurations wherever possible**. A consistent, robust configuration will reduce the work required across implementation, roll-out and on-going support.

• **Use a cross-discipline architectural decision making committee**. Such a committee is necessary to future-proof the solution and ensure alignment with IT strategy. Key decisions are likely to be needed around the base Operating System, the use of a thick or thin client and the organisation's approach to technologies like cloud computing (e.g. Office 365). The project's impact on existing infrastructure will need to be considered, such as wireless usage and disaster recovery facilities.

• **Have an organisational change strategy that includes early user involvement**. End user computing projects are vast in their reach and usually affect the majority of workers. Although business processes may stay the same, changes often impact ways of working. This transition can be unsettling, particularly for those users that are less technically inclined. Being IT-led, the need for a strong organisational change strategy to support users if often overlooked. We have seen a number of ways to increase early user involvement, such as the use of sandbox environments, identification of power users or 'champions' within the business and having a broad user base for piloting. These should be supplemented by the traditional approaches of structured training and regular communications.

• **Revise existing security policies and consider security trade-offs**. The applicability of existing security policies should be revised for compatibility with new technologies. Such trade-offs may include the need for flexibility versus security with administrative privileges, acceptance and support for smartphones, tablets and

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other BYOD technologies, application authentication integration with Active Directory and the maintenance of controls (e.g. encryption requirements for peripheral storage devices). These decisions necessitate that an IT security representative sits on the architectural decision making committee.

- **Perform thorough testing of the SOE, applications, hardware, peripherals and data**. Technologies must be thoroughly tested and piloted with users to confirm compatibility. Such testing should cover the range of hardware/software configurations within the organisation and will benefit from the involvement of a group of cross-functional users. Efficiency and effectiveness of testing will be made much more effective by early investments in understanding and simplifying the device and application landscape.

- **Use a risk-based roll-out strategy that is user-led and ideally automated**. Scalable options such as automated network deployment and self-service, where users choose a convenient time to upgrade, will reduce disruption and make ongoing upgrade and configuration management activities easier. However, the roll-out strategy should take into account the level of technology standardisation and cross-compatibility. While automated methods are preferred, some complex desktop environments will require a light-touch or manual intervention approach.

- **Minimise go-live disruption with strong support and fall-back planning**. Users often spend days familiarising themselves with a new environment. Support resources need to be increased in capacity and availability during migration. Organisations should strongly consider supplementing first line technical resources with post go-live 'floor walkers'. The production of accurate communications prior to migration is also necessary to minimise disruption, such as tipsheets that address queries encountered during user pilot activities, or tools which map settings in old software versions to new equivalents. Importantly, the organisation should have a process to roll-back changes if required.

With awareness of the inherent complexity and risks facing large and multi-faceted end-user computing projects, it's possible to manage them to successful completion. Contact one of our practitioners to speak about your End User Computing project and our project assurance and advisory services.

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