

Seven Steps to Successful Desktop Deployment



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Upgrading aging operating systems and applications holds many benefits for organisations – but only if completed successfully.

Most organisations see the advantages of upgrading their older operating systems. Upgrading to the latest version not only enhances security, but also improves reliability and increases end-user productivity. Most importantly, aging PCs running older operating systems and applications often cost more to own and manage than newer platforms.

Yet, many organisations still tread carefully when approaching desktop deployment projects. This is no surprise, given the statistics indicating the high failure rates and costs associated with these types of projects.

Dimension Data has completed desktop deployment projects for a variety of organisations around the world. In this document, we share our experience and outline seven practical considerations to keep in mind when undertaking a desktop deployment project.

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Step 1: Do a business case for the project

A desktop deployment project affects every workstation in an organisation's environment. As such, these business critical projects tend to carry higher risk and it is advisable to obtain project sponsorship from the senior executive. The CEO is typically a good recommendation, as desktop deployment projects can have a far-reaching impact on the business as a whole. As a result, it then becomes important to start by drafting a business case for the project.

A business case needs to take into account the fact that organisations typically refresh about 30 percent of their machines every year. As a first step, the business case needs to review the cost of running machines in the existing environment and the cost of maintenance in terms of patches and upgrades.

We recommend investigating the costs of the desktop deployment exercise across the organisation's PC fleet, including the costs associated with applications and migrating user data. The business case should also take into account the office and network topology, as deploying branch offices can have further cost and performance implications.

Other important aspects that need to be considered are training and support costs for end-users, both during the deployment phases and post project completion.

Step 2: Do an inventory of your assets

Surprisingly, many CIOs underestimate the number of PC assets and applications in their environment. They simply do not know the answer to the question: How many computers do you have? On average, CIOs also guess that they only have 200 applications in their environment, when it is common for an organisation to have several thousand.

For a desktop deployment project, it is vital to have an up-to date inventory of the organisation's PCs and applications constantly. Also, an organisation will need to conduct an inventory on a regular basis. A typical guideline is to conduct a weekly inventory exercise to gather information on the types of applications being used, as well as the types of hardware in the environment. An ideal way to accurately collect and report on inventory information is to use Microsoft Systems Management Server 2003, or Microsoft's next generation offering, Systems Centre Configuration Manager 2007. Many organisations have deployed SMS having cost effectively purchased the appropriate licences through volume licensing agreements.

Step 3: Consolidate your applications

Determine which applications will be allowed to be redeployed on new systems, and start a process of packaging or scripting those applications so they can be reinstalled quickly and consistently without user intervention.

In other words, consolidate the applications that the organisation wants to utilise, rather than allowing every single application to run. Chances are that the organisation is using multiple versions of the same application. From our experience, an organisation may have ABC FlowCharter on their inventory list. ABC as a software company has not existed for the past five years so it would be advisable for the organisation to remove this application and seek an appropriate replacement.

Step 4: Consolidate your hardware

Organisations typically have far too many different types of desktop and laptop PCs due to lack of centralised purchasing and regular hardware refresh. We have seen cases where as many as 180 hardware types were discovered. It is recommended that organisations use the opportunity created by a desktop deployment project to rationalise the hardware fleet. It is a cumbersome process to manage and maintain a vast array of different hardware vendors and models. It is important to understand the hardware requirements as dictated by the operating system and applications you are going to deploy, and identify which PCs need to be replaced.

Step 5: Establish an imaging process to create a standard image

Once the hardware inventory is known, the next step in a deployment project is to establish an imaging process to produce a standard software image for the workstation. This assists with configuration management and also accelerates deployment.

There are many ways to install a Windows operating system and the applications that it hosts. One is to manually install and configure the operating system and applications for every machine in the environment. Our recommendation is to create a single operating system image that supports all hardware types. For example, to manually install and configure Windows Vista, it takes approximately two hours per machine. By creating a single operating system image, the installation and configuration can be reduced to 35 minutes. Applications should also be packaged for automated installation to achieve a zero-touch build process eliminating the effort, potential errors and costs associated with manual installations.

Step 6: Automate the preservation of local user data and preferences

Establish an automated process for capturing the user data settings and preferences from the current system, and restoring them onto the new system. A gripe from PC users during desktop deployment projects is that they sometimes lose their settings and files. Users also commonly save files in different locations, which they cannot always remember. An automated process is therefore required to harvest and save

files to a known location. When this machine is rebuilt, the files will be automatically copied to the right location on the PC. For this automated process, our recommendation is to use Microsoft's User State Migration tool. It is typically difficult to configure, so it would be advisable to approach a partner for a solution that introduces the tools and processes to ensure that all the users' files, settings and configurations are maintained from one platform to the next, reducing post deployment issues and ensuring that critical data and settings (i.e. Internet Favorites) are maintained automatically.

Step 7: Deliver an end-to-end process

Desktop deployment and management is a continuous exercise and does not stop when the initial project is finished. A robust, maintainable process is therefore required that allows the IT department to refresh workstations at will. By being able to return a machine to a known, consistent state at any time, support costs and productivity outages can be massively reduced. It is important to establish automated deployment processes and service management procedures to support and maintain the new environment and enable successful PC lifecycle management.



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