Your Ticket to Faster, Hassle-Free Windows 10 Servicing

Let ReadyWorks show how you can leverage automation to take the pain out of managing annual OS updates.

readyworks





2020 – the year everything changed!

2020 affected every aspect of the way we live and work. Businesses had to make huge changes, at speed, to the way they deliver services and how employees work together.

The COVID-19 pandemic made IT departments the heroes of their companies as teams saved operations by deploying remote collaboration tools, supporting workers as they got their home offices up and running, and accelerating digital initiatives to keep the business thriving.

It looks like these changes will be here to stay. Industry surveys have noted:

69%

Board of directors accelerated their digital business initiatives due to the pandemic.

53%

Large companies plan to reduce their office space.

76%

CIOs reported increased demand for new digital services and 83% expect that to increase in 2021.

With a greater workload, a more complex IT environment, and a distributed workforce budgets and resources will remain stretched. Yet end user teams still have to manage Windows updates every year. Is this as simple as deploying a patch or will there be a requirement for outside services or additional resources?

There's a common misconception outside of IT that once you've gotten to Windows 10 the ongoing updates are simple. We know that's not true. No IT infrastructure manager who has managed a Windows upgrade can reasonably believe the annual updates will be low-risk or hassle-free.

What about modern management? At its core modern management simplifies and automates the endpoint lifecycle as much as possible. This should, obviously, be the end goal of your end user services organization. However, the suite of tools, requirements, and processes supporting modern management are still in their infancy. By Microsoft's own account, it will take them 4 years to achieve the modern management vision–and they own the operating system, the tools, and are largely standardized on their own platforms.[1]

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Every organization facing the requirement of upgrading their endpoint environment annually should take a good, hard look at the different options and approaches being taken by the industry. For our part, the ReadyWorks team has been delivering endpoint migration projects to mid-market and enterprise organizations for over twenty years. In this e-book we will discuss our perspective on best practices, highlight challenges you may face, and propose solutions you may want to consider.

Along the way we'll be sprinkling in call-outs on why we built the ReadyWorks platform and why we believe it can be a great tool as you figure out how to tackle this problem.



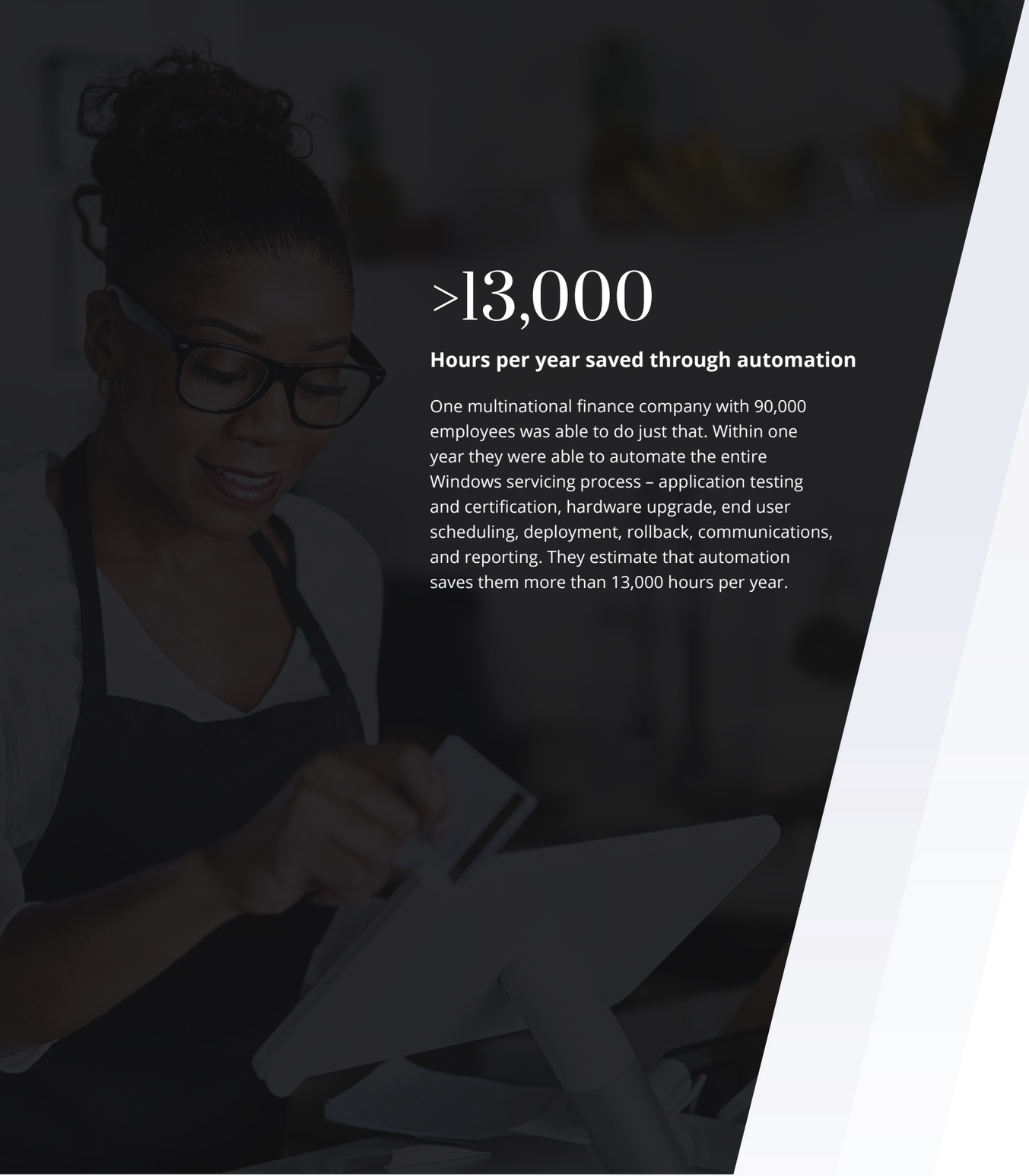
[1] Dan Wilson and Stephen Kleynhans, "Embrace Windows 10 Modern Management to Enable a Highly Distributed Digital Workplace," Gartner Research, October 13, 2020.

Why is it difficult to keep pace with Windows 10 servicing?

Think about how many people and how much time you devoted to the Windows XP upgrade. How about Windows 7? Windows 10? It likely got easier with each migration – which is great – but none of those programs were easy. Think about application inventory, testing and certifying apps, replacing hardware, in-place upgrades, sluggish backends, incompatibility, scheduling, communicating, deploying, rolling back, and reporting. With all of this being managed via email, in spreadsheets, or on post-it-notes any number of issues caused delays:

- Missed applications or applications that had to be upgraded prior to the migration.
- Scheduling thousands of people, their admins, their managers, and their consultants.
- Lack of understanding around hardware – what you had, where it was, and who was using it.
- Morning standups and hours upon hours spent pulling together status reports, charts, and RAG status.
- Pivot tables and more pivot tables. Literally running one of the company's largest initiatives on spreadsheets.





>13,000

Hours per year saved through automation

One multinational finance company with 90,000 employees was able to do just that. Within one year they were able to automate the entire Windows servicing process – application testing and certification, hardware upgrade, end user scheduling, deployment, rollback, communications, and reporting. They estimate that automation saves them more than 13,000 hours per year.

Windows as a Service will likely continue the trend of being an easier migration over time - but you'll still be upgrading every computer in the company and there will still be issues.

The Project Management Institute's 'Pulse of the Profession® 2020' report noted that:

IT organizations waste an average of $101 million for every $1 billion spent on projects and programs due to poor project performance.

In the case of Windows 10 servicing that's the reality of executing a complex program, in a constantly changing environment, in an organization that is trying its best to keep great records but simply can't keep up with everything (which is just about every company.)

The Big Questions

Before you roll out any Windows 10 update you need to tackle the big questions. Think about the following:

What applications are you using and how are they accessed?

How will the schedule be structured?

Which applications need to be tested?

How will you handle logistics?

What hardware is nearing end-of-life or won't work with the new OS?

What tools do you need to access?

Let’s start with tools

Recognize that to manage Windows Servicing you’ll need to rely on a number of tools to get specific answers to the big questions. Systems Management tools (BigFix, SCCM, InTune) are a good place to start to get information about hardware and installed applications. You will need the CMDB to round out that picture with more granular information about ownership & entitlements. You will also likely need to utilize your Access Management systems (AD, Okta) to identify applications that aren’t installed locally. You may also be pulling in network information to pinpoint location, HR information to identify managers and escalations paths, and asset management records to identify where software and hardware are in their lifecycle.

These tools will probably get you all of the information you need, but you need all of that information collected in one place, in real time. Traditionally this is done using project managers, spreadsheets, and post-its - and this where the errors, delays, and cost overruns start. To really automate Windows servicing, you will need one more tool - a command and control system to collect and manage this information in real time. Consider ReadyWorks for that.

To automate Windows servicing, you need a command and control system that collects and manages information in real time.





What applications are you using and how are they accessed?

In the end, your program is primarily about making sure the applications work after the upgrade, and the first step in making sure your applications work is figuring out what applications you actually have. If you think you know the answer, think again! Even the most experienced program manager can underestimate the number.

In some cases, you may only have about 10% of the number of applications initially reported by your systems management platform.

Getting an accurate view from the tools you use is typically something of a process:

1. If everything is up to date in your CMDB, then great, you're done!

2. If Your CMDB is kind of up to date but you want to cross reference with your Systems Management Platform then:

    - Pull an inventory of locally installed applications.
        - This inventory will be wrong (making you further doubt your CMDB).
        - Rationalize the inventory using spreadsheets or a rationalization tool (hint: ReadyWorks has that).
    - Compare your CMDB and Systems Management inventories to come up with a clean list of applications.

3. Once you know your locally installed applications you need to think about applications that are accessed remotely.

    - If everything is up to date in your CMDB, then great, you're done!
    - If not, or if you want to validate the information in your CMDB, you will want to analyze data in tools like Okta or AzureAD to see what users are accessing.

4. Prior to the upgrade you may want to think about system hygiene. If you can consolidate multiple versions or similar tools this is a good time to do so.

5. Keep in mind that your application inventory, and the record of who is using what, is constantly changing. The records you pull in January are unlikely to match the records you pull in March so keeping a real-time, rationalized inventory is the key to success. ReadyWorks can help you do this.



Which applications need to be tested?

If there is any chance of crashing the CEO's laptop, impeding vital equipment in the operating room, or halting trading floor activities, you won't risk blindly rolling out the update. But you can't spend 6-9 months testing everything anymore if you expect to be done before the next upgrade. You'll need a new approach. We recommend sorting applications into three risk levels with three different testing strategies:

Critical Applications

Will undergo formal end user testing and sign-off.

Important Applications

Will be piloted to a test user or group and, if no issues arise, will be considered compatible and deployed to the larger organization

Low-risk Applications

Will only be reviewed if an issue is reported

Adopting this process will cut the number of applications needed to be pre-tested to about 15% of your estate and reduce validation time to several weeks or, at most, a couple of months.

You can speed up this process, and greatly reduce risk, by utilizing automation:

1. Use automation to determine which applications are critical or important. Platforms like ReadyWorks will analyze the environment and make a recommendation based upon pre-defined criteria such as: application is flagged in the CMBD, a certain percentage of users have an application, or a certain percentage of a business uses an application.

2. Automate the testing process by having your command and control platform automatically build virtual machines with the applications to be tested. This way the testing and signoff of critical applications can be managed from one system.

3. Prior to piloting applications have your command and control system provision a VM, install the application, launch it, and report back the results. If there are no issues at launch you can feel more secure that the application won't fail in production.

4. Automate the population of deployment rings or collections based upon application testing criticality. This way you can ensure that the pilots go first and that no users with an important or critical application receive the upgrade until that application is certified.

What hardware is nearing end-of-life or won't work with the new OS?

Typically, a third of all equipment will be nearing end of life within each Windows update period. In the past, many organizations used the Windows upgrade as an opportunity to refresh their IT estate. This is still a good strategy. The key is to use automation to streamline the logistics of the hardware refresh. Consider automating each of these hardware tasks with your command and control platform:

- Identifying incompatible machines or machines that are end of life.
- Defining what needs to be installed based upon your application inventory.
- Communicating the need to replace machines with your end users.
- Scheduling the machine swap.
- Generating tickets to order and provision new hardware.
- Managing shipping and receiving logistics.





How will the schedule be structured?

Automatic reboots and pop-ups that take out access with little warning are a no-go for most companies, particularly for those users managing critical or customer-facing operations.
Ask yourself:

- What do you know about your company’s business, blackout dates or critical working hours?
- Do you understand the priorities of every department?
- Which groups need to be updated together?
- Do you know who can give the ok for scheduling every user?

Whatever the enterprise size, it’s unlikely you have the resources to be so closely aligned with your users. Are you prepared to take out access for any user for up to 45 minutes without knowing more? And that’s if they’re office based. For remote workers it could be longer.

You’re going to need to get full agreement on timing and take extra steps to ensure the readiness of remote workers. You’ll also need to be agile to respond to changing business priorities. If COVID-19 has taught us anything, it’s that we need to react quickly to changing circumstances!

How will you handle logistics?

Coordinating thousands of end users and devices while minimizing risk and maximizing efficiency is no easy task.
There are four main areas to consider: Communications, Scheduling, Deployment, & Reporting.

Communications

Everyone gets a little nervous when they hear their machine will be upgraded – and rightfully so. Don't underestimate the need to inform users about the what, why, when, and how of the program. That said, no one wants more emails from the IT department so make sure your messages are targeted and timely. Also, this is one of the easiest tasks to automate so take advantage of the tools you have and save yourself hundreds of hours of manual effort.

Scheduling

No CIO has ever asked to slow down an upgrade. The key to maximizing speed is having a robust method to schedule application testing and the system upgrade. Application testing will require that you have an automated method to provision a test environment and collect feedback from users. The system upgrade will require that you be able to automate the scheduling of different types of deployment scenarios such as in-place upgrade, in-office hardware refresh, and work from home hardware refresh.

Deployment

Use automation to inform your management platforms and populate the respective deployment rings, waves, or collections. If there is an existing ITSM or ticketing platform, use automation to order hardware and submit service requests.

Reporting

Running meetings, chasing issues, extrapolating data, and building charts to present a myriad business views to stakeholders means reporting is no small task. These activities can often take a full day or more – that's 20% of a program manager's role! By leveraging a central platform, you will basically eliminate this activity while providing stakeholders a richer set of information tailored to their requirements in real time.

One multinational company already knows how much time they can save using automation for their Windows 10 servicing.

With nearly 80,000 employees, before automation it would take a team of 3 – incorporating 2 project coordinators and 1 project manager – over 9,000 hours to complete the project within 18 months.

Using ReadyWorks, they can now manage these programs using only 1 coordinator, completing Windows updates in around 1,500 hours!



How to achieve hassle-free Windows 10 Servicing

If you don't want to accept the risk of going over time and budget and the hassle of manually managing Windows 10 servicing programs every year, there are few routes that you can take:

Spend

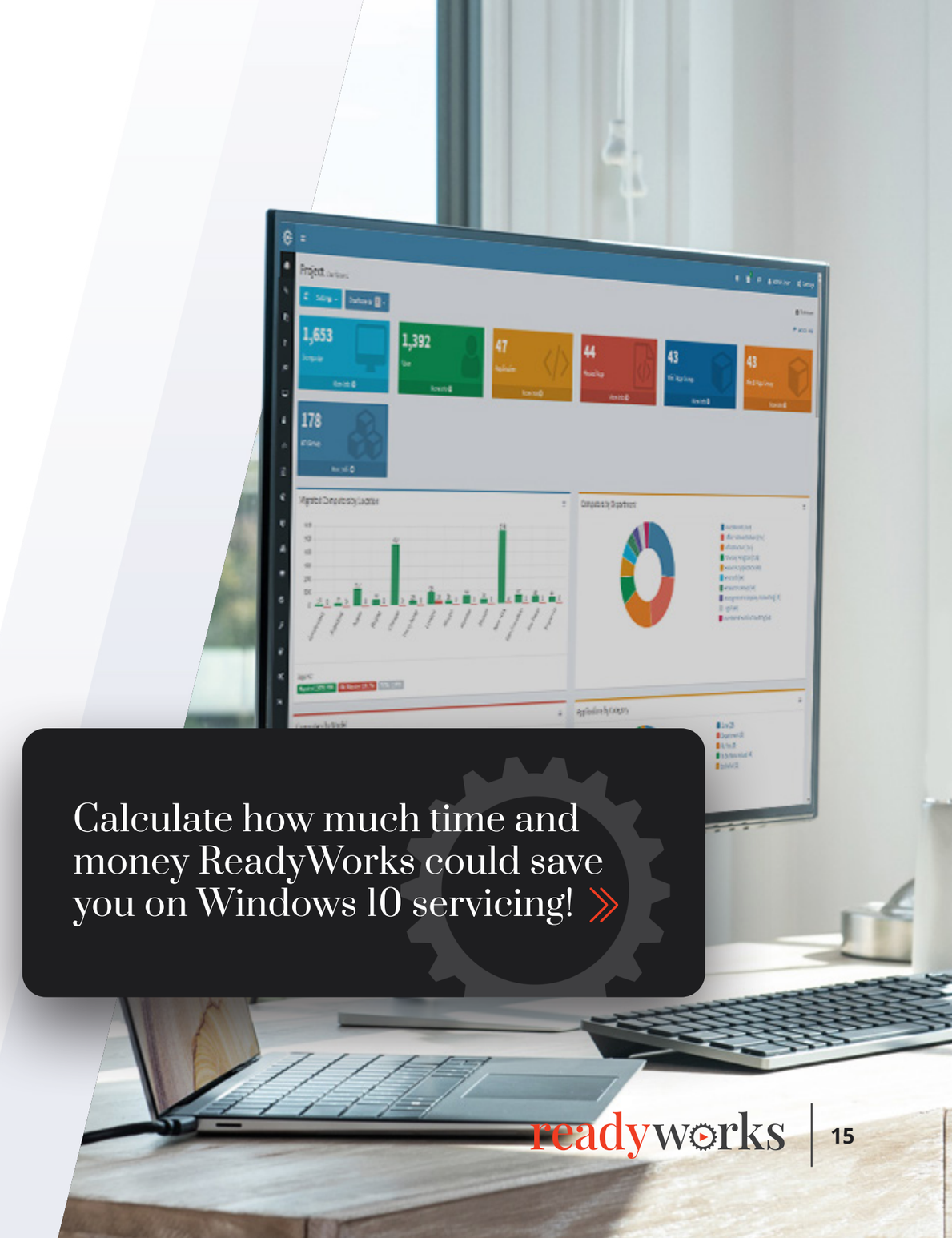
Hire additional headcount and make Windows servicing a full-time role for a team to outsource these programs.

Build

Custom build a platform in-house by analyzing your tasks and workflows. It is possible, but it's going to take time and money and you'll have to maintain it every year.

Adopt

Leverage a ready-built platform that can be customized to your specific needs, taking the hassle out of annual Windows 10 servicing as well as many other IT infrastructure projects.



ReadyWorks is a 4-in-1 Solution

ReadyWorks brings together data analysis, project management, workflow automation, and reporting into a single command and control platform to turn annual Windows servicing into a hassle-free process.

Data Analysis

Clean, accurate, real-time data from multiple sources

- Connects to all the systems where information about users, hardware, and application is stored: system management tools, access management platforms, ITSM systems, CMDBs, and HR systems.
- Aggregates that data into a single view to save you months of effort during the discovery phase of your project.
- Identifies which applications require formal testing, pilot testing, or are ready to migrate.
- Identifies hardware that is due for replacement.

Project Planning

Planning tools that require less human input

- Enables quick launch with best-practice project templates.
- Automatically populates migration waves based on application, user, and system readiness.
- Provides color-coded, interactive Gantt charts for quick visualization of migration waves and tasks based on real-time information.
- Automatically populates build sheets, task templates, and wave plans.

Workflow Automation

Workflow automation for people and systems

- Uses event triggers or program status to automatically launch updates via your system management platform.
- Creates team member tasks based on event triggers or program status.
- Automates end user self-scheduling with the self-service portal.
- Automates communications to end users, team members, and managers.
- Enables automatic rollback and reschedule workflows that don't require human involvement.

Reporting

Analytics for instant visibility into program status

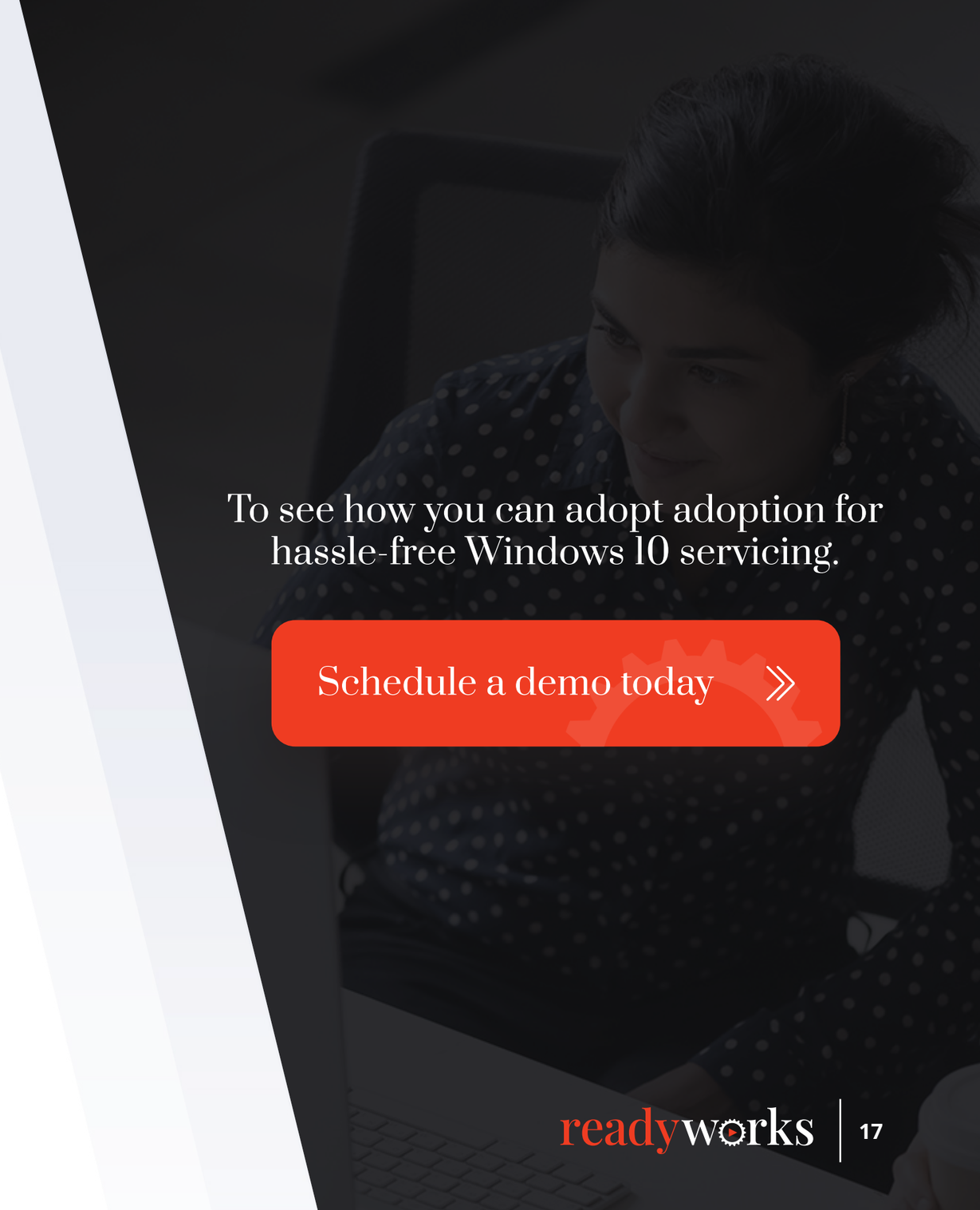
- Combines live data from multiple sources for a holistic view of Windows update status.
- Delivers detailed information about systems, users, applications, OS versions, and the businesses they support via multi-level dashboards.
- Enables customizable dashboards and reports for easy access by any stakeholder – from CIO to CISO to engineer.
- Provides a detailed audit trail to show all systems were updated properly.

With ReadyWorks you'll be able to:

30% **Shorten project timelines by 30%.**

50% **Automate 50% or more of manual tasks.**

40% **Reduce labor costs by 40% or more.**



To see how you can adopt adoption for hassle-free Windows 10 servicing.

Schedule a demo today

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readyworks.com/demo