

## Utopic Software – PC Life Cycle Management Process



### Introduction

The PC Life Cycle Management process has become one of the more difficult processes to manage for IT organizations. As organizations look to **improve end-user productivity, create competitive advantage and reduce support costs** the challenges are becoming more and more daunting. IT organizations are looking to implement modernized and innovative transformation that leverage optimization and automation to achieve the necessary economic models to address business requirements as well as manage future IT consumption models. The challenges are not necessarily with customer technology investments, but rather the failure to step back and develop a strategy to define the new process which will optimize the business outcomes. At the very beginning of the PC Life Cycle Management Process is the Build/Deploy process. Most organizations, have significant challenges with this process, especially if the process incorporates the PC Refresh process or an OS Migration. Again, this isn't a technology challenge but rather a process challenge dating back to the early days when adds/moves & changes created escalating operational expenses.

The Utopic team has been focused on the PC Life Cycle Management process for over 25 years and the secret to our joint success with customers and partners is identifying the business requirements and project time lines, determining the customer process gaps, reviewing and confirming the deployed technology, and presenting/overlaying our people, process and technology with the current customer infrastructure. The DNA of our team is a bit unique, as our technology was developed by a core team that managed large PC outsourced Service Desks and Client Management Tools for thousands of PCs and the amount of manual scripts that were required to manage the PC Life Cycle Management process was staggering not to mention the ongoing maintenance was unwieldy and expensive.

PC Refresh projects can be difficult as well as operationally can be expensive depending on the business driver for refreshing the computers. We have found that PC Refresh projects touch nearly all facets of the IT and business organization and if not well planned and communicated can cause significant business interruption. If the IT organizations relationship with the business is strained due to increased business downtime or customers satisfaction issues or more seriously a compliance concern we have witnessed PC Refresh projects to become very complex and costly. The 2015 Gartner Research Report on Client Management Tools (CBTs) and IT Service Support Management Tools (ITSSMTs) clearly outlines that the technology leaders in these areas focus on adoption and integration. We believe that collaboration within these two teams during a PC Refresh engagement is paramount to success of the project.

## Project

PC Refresh projects can be delivered three ways; customer executed, outsourced, or project based combining the customer and consultants. Utopic believes that project based engagements are much more successful and cost effective. A typical project that we engage has the following criteria;

1. Defined PC Refresh Projects with approved budget and specified time lines. We have been successful with small and large PC Refresh Projects ranging from 100 PCs to 10,000s PCs.
2. PC Refresh Projects can combine more activities than just refreshing PCs, Monitors and Peripherals. Often times organizations want to use the PC Refresh project to optimize process, leverage new technology, or address other business challenges such as compliance related issues. Compelling events such as OS migrations, profile migrations, and hardware refreshes are more typical types of PC Refreshes.
3. We have been involved in PC Refresh projects that are 100% Compliance driven, such as refreshing and remediating 1,800 PCs before the other PCs are refreshed. Through our initial discovery for a PC Refresh project we may identify that the application load on a large number of the PCs should be optimized as they aren't being used by the user and the company is incurring a significant amount of expenses to manage and administer dormant applications.

## Process/Solution

The PC Refresh projects usually follow the same process, but depending on the specific project resources might vary to ensure the appropriate customer collaboration as well as the use of technology could vary based upon the customers' existing tools and the required optimization to ensure mutual success.

### **The Utopic PC Refresh Process includes but not limited to the following activities;**

- 1-2 day project assessment to confirm the project deliverables and time lines
- Execution of the fixed bid agreement (75% of our projects are fixed bid)
- Team introductions to ensure cultural compatibility and confirm the expertise required for the project
- Confirm security background checks and complete customer onboarding requirements
- Identify secure onsite or offsite space to ensure the inventory and day to day work can be achieved
- If there are existing processes in place that the customer wants us to follow then we evaluate the process and ensure that it will work for our team. If there isn't an existing process then we would implement our recommended practices based upon the project assessment.
- Review, propose and communicate a schedule for the PC Refresh, inclusive of the location logistics and site owner from the business
- Confirm the scheduled roll out
- Identify the procurement contact and review the required PC Refresh equipment to be ordered and the estimated delivery times
- Review existing inventory reports or run a separate discovery of the hardware and software inventory that is currently deployed

- Identify and implement the refresh process for remote and local users
- Analyze the information and reconcile the new standards to be deployed
- Set up and communicate our service desk support process for the PC Refresh related issues
- Review existing imaging process and tools. If necessary optimize the process and leverage our technology to automate for efficiency purposes
- Implement a scheduling and verification process to ensure proper expectations are communicated and to understand any additional requirements
- Depending on the size of the project and the time line our Imaging and deployment teams would begin the deployments
- The teams would conduct asset recovery and document the process as required by customer compliance requirements
- Daily communication calls would identify process improvements, escalations, and team building related communication to reinforce positive customer/consultant collaboration
- Shared metrics and deliverables would be reported daily
- Weekly deployed PCs would be reported and accepted by the customer to ensure proper invoicing of the fixed bid deployment process

**The remainder of this section will provide more detail regarding the critical success criteria for a PC Refresh Project;**

1. **Imaging** - Our imaging team will work closely with the customers IT team to understand and document the current imaging process. The existing imaging process would be adopted and continuously monitored as well as improved throughout the project to ensure an optimized and automated approach. The imaging process and technology is most often times manual and once we implement our optimized process and automated technology the customer understands how we are able to image much more efficiently. The imaging team maintains the imaging server and will monitor the network to achieve maximum productivity.

All workstations will be prepared and reconciled if necessary for each end-user based on the information collected during the discovery and verification process. We have some controls and pre-site inspections that will take place prior to shipments that will recognize potential benefits such as not replacing monitors or peripherals if the user recently received updated hardware to avoid costly shipping costs.

2. **Scheduling and Verification** - Scheduling is critical to achieving the per day metrics as well as setting expectations with the business. Due to the multiple locations of some PC Refresh projects, separate schedules will be required; one that focuses on the multiple office buildings in the main campus and one for the remote sites spread across North America and International locations if required. It might be necessary to take into consideration the site locations, resources and number of PC's requiring a refresh at each site to ensure our site objectives are achieved as well as to avoid overtaxing the core team which may be called upon to provide additional resources based upon situations that may arise. A process will be developed to verify and confirm end-users status, hardware, application requirements, mapped network drives, printers and so on directly with the remote site points of contact or if necessary the user directly. For remote sites, this process will start a few weeks before each site is scheduled and then reconfirmed a week before the

scheduled refresh date to account for any changes. The double verification process is necessary to ensure correct equipment was shipped to each site and to allow for shipping transit time.

3. **Deployment** - The overall image and installation process will be designed to be as simple as possible to install and reduce the risks normally associated with field based PC configurations. Our desktop team will work closely with the customer's desktop team to understand and adopt required processes. The desktop team can deploy any number of workstations per day but typical refresh projects call for 45-100 workstations per day.

The desktop team will install and configure workstations that are pre-loaded by the imaging team. Utilizing an automated "self-configuration" process, user specific software will be updated and loaded to the new workstation as well as the user will be "registered" to the network. The end-users profiles will be backed up from their old workstation and restored to their new workstation along with their default printer settings.

An essential requirement for the PC Refresh project will be to take every multi-tasking opportunity possible to maximize the number of systems that could be migrated at one time. An expectation for the project will require each Utopic technician to migrate up to 4 workstations at any one time, moving between systems as opportunities arise.

We can also apply a modified version of our PC refresh process to refresh work from home/remote users that might not be located near one of the customer's offices.

4. **Inventory Database** – We can use the customers current inventory database or leverage our preferred technology to enable our team to track the life cycle of the work orders, run reports based on numerous filters, and store all the information gathered in a friendly user interface. Some of the data that will be documented will be the end-user's name, user ID, PC type, serial number, hostname, printer, and application lists. The work orders will be utilized throughout every step of the refresh process from the initial verification and scheduling to marking the old equipment as returned as the assets are recovered.

During the discovery phase the database will allow us to quickly identify gaps in the customer asset inventory system. Having this ability will be essential to ensure the correct workstation is being built for each end-user. As the Refresh Project progresses, we will continue to add further customization to the database to account for other elements that need to be tracked or reported to the customer. As an example, air card details; we might have to incorporate the IMEI and Sim data of each air card for asset inventory, activation and future troubleshooting purposes to make sure the carrier doesn't over charge the customer for new connections. The inventory database will be extremely valuable and often times the customer will integrate our technology with their existing ITSSM solution.

5. **End-User Experience** – Setting realistic expectations and satisfying each end-user will be a top priority throughout the PC Refresh project. Utopic will make every effort to minimize end-user downtime by ensuring accuracy of the information provided prior to the end-users refresh and providing support staff for desk-side

and remote support services following the migration of their workstation. The teams goal is to ensure no data loss and verification of all required programs and software following their refresh.

6. **Client Communication** – With the numerous moving parts of a PC Refresh project, constant coordination and communication between the core team and the customer is required. The inventory database will be a valuable tool during meetings with the customer to provide “on-the-fly” updates and reports. Any issues that arise will be escalated and addressed immediately. Process and certain measures will be in place to avoid common issues. In addition, because of our teams vast knowledge in the PC Life Cycle Management business we will provide additional consulting recommendations to the customer that might not be related to the PC refresh project.
7. **Remote Service Desk** – Utopic will also provide a remote service desk to assist end-users following the migration of their workstation to reduce the amount of additional calls to the customer’s service desk. Our service desk will be available for calls related to missing software, security settings, missing favorites, or any other issues relating to the PC Refresh project. This service will shift any additional load post migration from the customer’s service desk to our service desk as well as the need for the customer to allocate additional resources to this project.

## Summary

Utopic will collaborate with the customer to ensure we capture all the relevant requirements and leverage our recommended practices involving a people, process and technology approach to optimizing and automating the PC Life Cycle Management Process. As part of the PC Refresh project, we will help our customers improve customer satisfaction by increasing end-user productivity while reducing support costs. Our fixed bid deliverables provide customers with the confidence that we will deliver against their requirements.

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