

Best Practices in Upgrading Notes Clients

Cooperteam Webinar

April 20 2010

Agenda

- Introduction
- Methodology
- Process
- Tools
- Demonstration
- Conclusion
- Questions & Answers

Introduction

Objective

Enable users and the organization to benefit from the new features of the software

While minimizing:

- Disruption to users
- Administrative efforts & costs
- Risks

Upgrading Challenges

- Organizational
- Technical

Organizational Challenges

- Why upgrade?
 - Business justification for upgrading (costs/benefits)
- Change Management
 - Ensuring management commitment
 - Preparing users for the changes
- Project Management
 - Visibility and Control - delivering results within budget and on schedule

Technical Challenges

- Dealing with a heterogeneous client base
 - Machine capabilities and software versions
 - Overcoming Admin Rights constraints
- Managing network impact
 - Delivery without overloading the network
- Minimizing end-user impact/disruption of service
 - The ideal state - the user is not exposed to the upgrade process, continues working as usual
- Minimizing post-upgrade Support demand
 - The upgrade does not generate a wave of support calls

The Top 6 Reasons for Upgrade Project Failure

1. Lack of a true Project Sponsor at the right level
2. Weak Business Case for upgrading
3. Inadequate Communications with users
4. Insufficient User Training
5. Inadequate scope of the Pilot Phase of the project
6. Underestimating the technical scope of the project

Consider Upgrading as an *Opportunity*

- The Upgrade Project can be an *opportunity* to:
 - Standardize & enforce client settings & configurations for multiple groups of users on an enterprise-wide basis
 - Reap the recurring benefits derived from this standardization
 - Administration
 - Helpdesk
 - End-user productivity

Methodology

Upgrade Project Methodology

1. Sponsorship
2. Business Case
3. Communication Plan
4. Training
5. Pilot
6. Technical Scope

Sponsorship

Sponsor's Role

1. Senior-level person with enough influence to promote the project with decision-makers and the rest of the organization
2. Presents and promotes the project to management, highlighting the benefits of the new version to both the organization and end-users
3. Holds a “kick-off” workshop with the decision-makers to ensure that they understand the purpose and challenges of the project, and to address any questions they might have
4. Publishes the initial communications to the whole organization and addresses any resistance

Business Case

Address how the business and individual users benefit from the upgrade?

1. Specify how the upgrade will help the business to reduce costs and increase productivity (improved performance and capabilities, ease of use and administration, fewer support calls, end of support for product, etc.).
2. New features and functions mean new opportunities for IT to impact how the business operates.
3. Take a broad view of the impacts of upgrading, do not let “budget silos” determine the scope. Include impacts on users.
4. Validate your Business Case with your Sponsor and with the financial management before requesting budget allocation
5. Be realistic with your estimation of business costs and benefits

Communication Plan

Build enthusiasm and understanding for the upgrade with all the stakeholders

1. Present the project to the technical teams impacted (Lotus Notes desktop platform, network admin, security, developers)
2. Plan the series of communications that users will receive during the upgrade, develop the texts, and schedule them
3. Make a dedicated hot-line and email address available to users for support questions before, during and after the upgrade
4. Perform an anonymous survey to assess user impressions
5. Use the company intranet to promote the project and update users on its progress
6. Keep management regularly updated on the progress of the project and expected completion dates

Training

Custom-design your training to meet your users' needs

1. Carefully evaluate the training needs of the users. Learning styles vary enormously – you may need a combination of online, classroom, coaching and printed materials.
2. Some users will need special training; especially VIPs, power-users and personal-assistants.
3. Prepare short, on-line demonstrations or presentations, before and after the upgrade.
4. Distribute printed FAQs and tips-and-tricks cards for users.
5. Ensure 'floor-walkers' to respond to urgent user questions on the first days following the upgrade.
6. Provide test workstations and accounts in group areas (e.g., canteens) to allow users to try out the new version before the upgrade.
7. Don't forget your administrators' and developers' training needs!

5 – Perform a representative pilot before you upgrade

1. The pilot should include a wide enough range of representative clients from your target population.
2. Estimate enough time to perform your pilot and be prepared to perform several cycles if you need to adjust your project plan.
3. Allow enough time to fully evaluate the results
4. Pilot with your technical teams and early adopters, not management!
5. Integrate members of your overall client base into the pilot only once you have stabilized your final client design/architecture.
6. Pilot in ALL language groups in use in your environment.
7. Perform a dedicated pilot for your mobile / Blackberry users.

Technical Scope

6 – Carefully assess the technical scope of the project

1. Perform an exhaustive audit of your Notes client base.
2. Define the minimum standards for a workstation to be upgraded.
3. Carefully select and document the configuration options for the target client architecture / design.
4. Evaluate the impact of the client upgrade on all your Notes applications.
5. Review the structure and use of the organization ECL, mailbox and application ACLs, as well as Domino and Windows policies.
6. Validate the Notes .msi and package installation options, these have recently evolved significantly.
7. Evaluate all mail-in databases and their templates.
8. Evaluate the impact of the migration on third-party systems.

The Upgrade Process

The steps of the upgrade process

1. Determine the minimum specifications for workstations to be upgraded
2. Audit the existing state of workstations - Identify those that can/cannot be upgraded
3. Define Notes client settings & configurations to be applied to specific groups of users
4. Deliver software to machines
5. Execute the upgrade

Tools

- Smart Upgrade (bundled with Notes)
- 3rd-party upgrade-specific tools
- Cooperteam's comprehensive client management upgrade package
 - Automates and provides project management control of the upgrade process from start to finish, (and beyond).

Cooperteam's *Desktop Manager Upgrader Package*

Supports the methodology and process described and enforces post-upgrade client standards.

- Identify which workstations are eligible for upgrade.
- Manage when the upgrade is executed.
- Ensure minimal impact on end-users
- End-to-end visibility of progress through the process
- Reduce risks & costs
- *Standardize and ensure on-going compliance of client configurations post-upgrade*

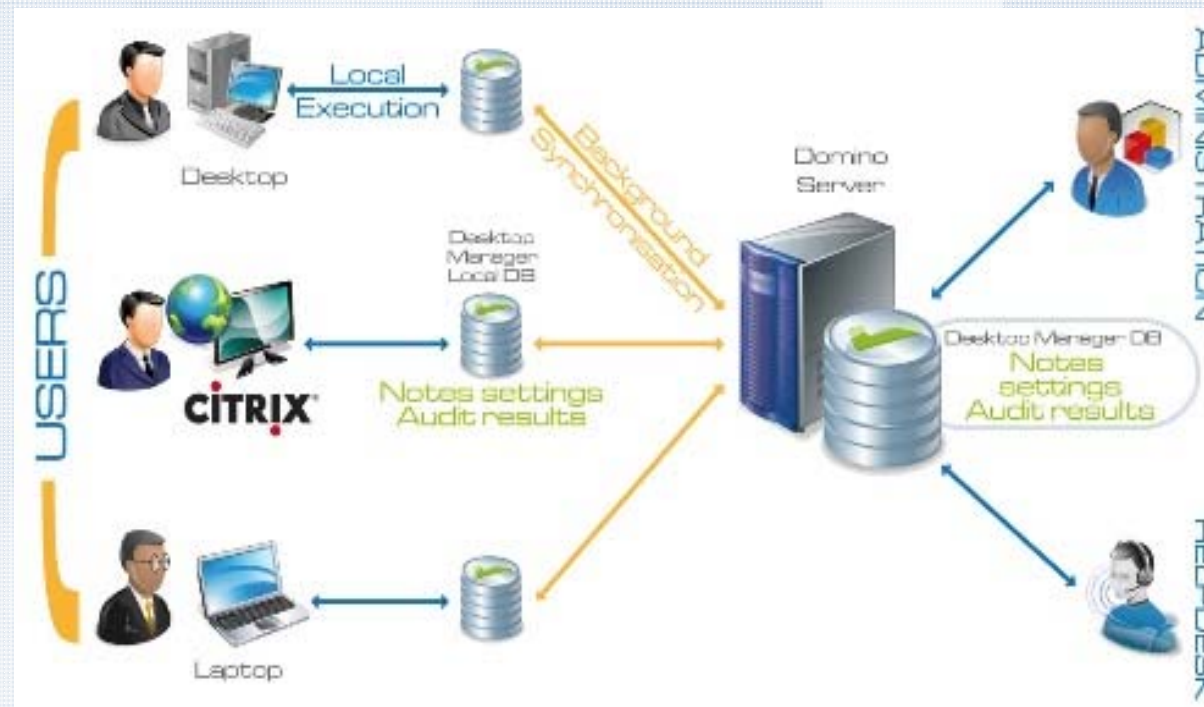
Demonstration

Cooperteam's *Desktop Manager Upgrader Package*

“Get it Right and Keep it Right”

Desktop Manager

The core platform for comprehensive Notes client management



Add-ons available for upgrades and user migrations

Conclusion

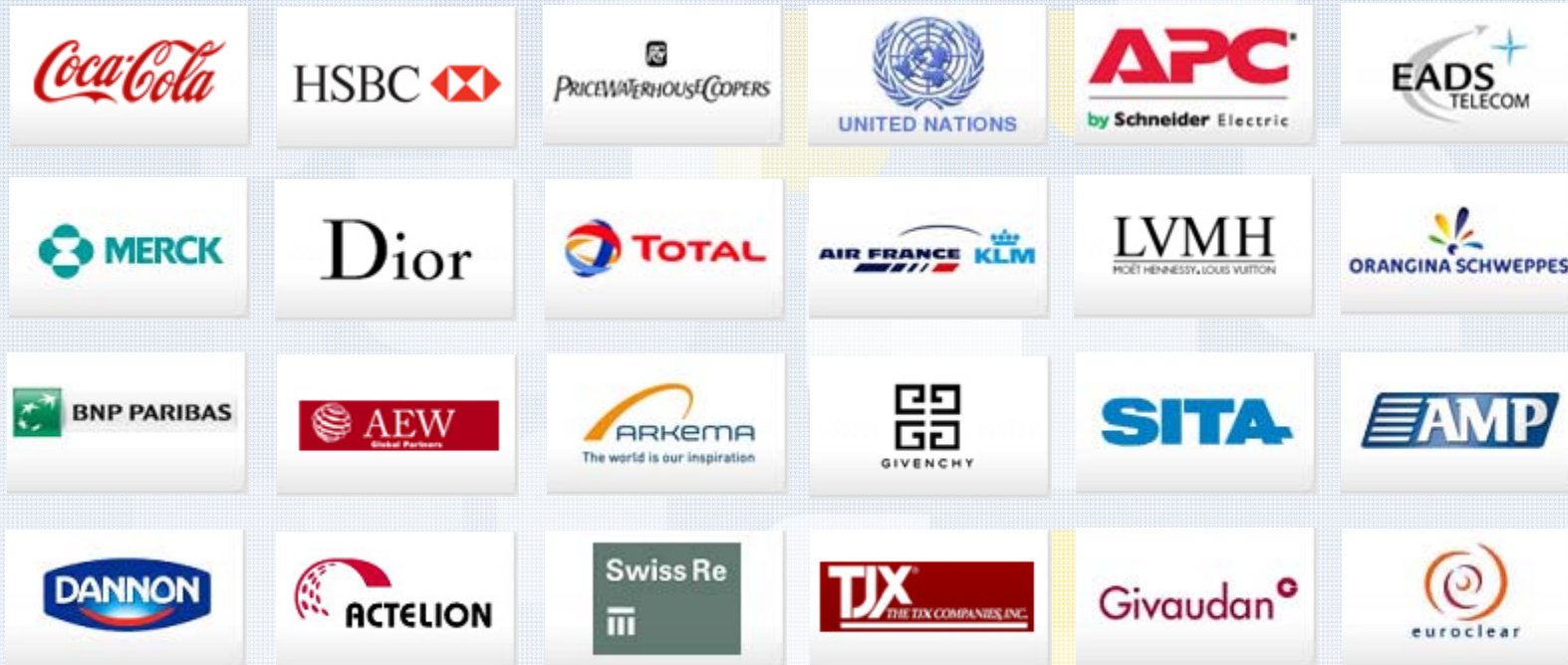
“Get it right and Keep it right”

- “Get it right!”
 - Minimize end-user disruption
 - Manage network impact
 - Gain end-to-end visibility over the process
 - Implement enterprise-wide Notes client standardization
- “Keep it right!”
 - Enforce on-going standardization *after* the upgrade

About Cooperteam

- Specializes in products and services to optimize Notes messaging performance in complex environments
- Founded in 1997
- Global operations
 - Americas
 - EMEA
 - APAC
- Installed base: 1.3 million users

A few references from our customer base



Questions?

For further product information, visit us at
www.cooperteam.com

Contact us:

Info@cooperteam.com

Tel: +1 617 859 8900

