Windows 11:
Your Ticket to a Faster, Risk-Free Migration

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Windows 11 – A new OS for a post pandemic. world!

In June 2021, Microsoft announced Windows 11 would replace its Windows-as-a-Service model and move us to annual updates. Clearly pitched as an OS that would meet the needs of a rapidly changing world to deliver a better hybrid working experience, Microsoft said Windows 11 would allow us to 'connect in new ways'. 3 years on from the start of lockdowns it seems that change is still the only constant.

68%
of employees want to work from home more often.

60%
of technology and business leaders indicated that improving the employee experience (EX) is a top priority over the next 12 months

300%
increase expected in the number of cyberattacks by 2025 (from 2015), based on current rate of growth

Managing complex IT environments will continue to stretch IT resources. Windows upgrades, annual updates, and patch management are adding to their workloads.

There's a common misconception outside of IT that managing your Windows 11 upgrade and yearly updates is simple. We know that's not true. No IT infrastructure manager who has managed a Windows upgrade can reasonably believe any update will be low-risk or hassle-free.

What about modern device management? At its core modern device management simplifies and automates the endpoint lifecycle while placing greater emphasis on the end user experience.. This should, obviously, be the end goal of your end user services organization. However, as you grow IT maturity to achieve modern device management, you will also need to integrate more hybrid digital infrastructure management (HDIM) tools and capabilities in to your IT estate, thereby creating silos of data and making it harder to manage workflows for change across those tools.

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.

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Why is it difficult to keep pace with Windows updates?

Think about how many people and how much time you devoted to migrating from Windows 7 to Window 10. 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.

Imagine you could automate your Windows updates while maintaining a real-time, accurate view of your endpoint environment.

>13,000/hrs

per year saved through automation

One Fortune 100 financial services 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.

Microsoft has said Windows 11 updates will be smaller, lighter, and more efficient – making them easier to install. But nothing is ever that simple. It's going to take time to prepare and train teams and end users on new features before upgrading to Windows 11. And every year you'll need to update every computer in the company. From experience we know there will be issues.

The Project Management Institute noted:

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 lifecycle management that's the reality of executing a complex program, in a constantly changing environment.

The Big Questions

Before you roll out your Windows 11 upgrade or any subsequent yearly 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 updates you'll need to rely on a number of HDIM 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 Your enterprise upgrade to Windows 11, 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 your enterprise upgrade to Windows 11, you need a command and control system that collects and manages information in real time.

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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.

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Which applications need to be tested?

While most mainstream applications are not affected by an upgrade from Windows 10 to Windows 11, build testing and testing of critical applications is still recommended. If there is any chance of disrupting crucial business operations – e.g., halting trading floor activities - or crashing the CEO's laptop, 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 the risk of breaking access to critical applications by leveraging ReadyWorks, a digital platform conductor.

Use ReadyWorks to:

1. Determine which applications are critical or important. ReadyWorks will analyze the environment and make a recommendation based upon pre-defined criteria such as the application is flagged in the CMBD or a certain percentage of the business uses the application.

2. Automate the testing process by automatically provisioning a virtual machine, installing the applications to be tested, and recording test results.

3. Automate the population of deployment rings or collections based upon application testing. 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 tested.

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. Factor in devices that are coming off of lease and Windows 11 minimum requirements to inform your upgrade plans.[2] 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:
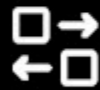
Identifying incompatible machines or machines that are end of life.

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.

[2] Analysis published in late 2022 showed just above 40% of machines met the Windows 11 hardware requirements!

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Imagine being able to successfully manage 2,000 user OS updates per day! That's what one ReadyWorks customer is doing today.

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 quickly to changing business priorities as well as any external factors affecting the business.

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.

SMBC already knows how much time they can save using automation for their Windows lifecycle management.

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.

"ReadyWorks saved our team at least 1 year of work for a project manager during our Windows 10 migration project – particularly in organizing, managing, and automating the application certification process – and delivered a far better end user experience than previous projects."

How to achieve hassle-free Windows Lifecycle Management

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

Spend

Hire additional headcount and make your Windows 11 upgrade and subsequent annual updates 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 your Windows 11 upgrade and every yearly update that follows as well as many other IT infrastructure projects.

Calculate how much time and money ReadyWorks could save you on Windows lifecycle management. »

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ReadyWorks is a Digital Platform Conductor

ReadyWorks provides visibility across your entire IT estate and orchestrates key business processes across complex, disconnected systems so you can achieve IT and business goals faster.

Connects All Your Systems

ReadyWorks is agentless. Use prebuilt connectors to hundreds of IT and business systems or build your own through our intuitive, low-code interface. ReadyWorks allows you to easily automate your business processes in days, not months. It's also agile enough to adapt to any use case.

Analyzes & Cleans Your Data

There are multiple "sources of truth" when it comes to data. And each source provides only one piece of the puzzle. Combine data from all sources to get a complete and accurate view of your environment and make better decisions.

Orchestrates Workflows

ReadyWorks orchestrates all the workflows and tasks required to manage migration programs or changes in your environment. Workflows are triggered based on readiness criteria for migration programs or to react to events (e.g., patch or upgrade required).

With ReadyWorks you'll be able to:

Automate	Migrate	Reduce IT programs costs by
80%	**3x**	**50%**
of workflows	**faster**	

To see how you can adopt automation for hassle-free Windows Lifecycle Management.

Schedule a demo today »

readyworks.com/demo