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Research Note   **Gartner**

Take these three steps to ensure a smooth Windows 2000 migration

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By K. Brittain, M. Silver, R. Colville

The consolidated service desk (CSD) and desktop management staff will become stressed and overburdened if a Windows 2000 migration is managed poorly. Increased call volume brings increased abandonment rates, longer mean time to resolution (MTTR) rates and decreased first-call resolution rates—critical performance metrics for quality of service. To remain credible, IS organizations must develop stringent migration processes and success metrics. The CSD must take the following three actions to ensure a successful Windows 2000 migration.

1) Involve multiple stakeholders
The CSD and desktop management teams should take an active role in the migration from the start. Representatives of each group should participate in planning meetings. Because the CSD is the users' first point of contact, it often has insight concerning what works for users. By leveraging the CSD's ongoing end-user insights, it can best represent a user's perspective regarding migration impact. With this knowledge, the CSD understands the impact of such issues as client software configuration and user training.
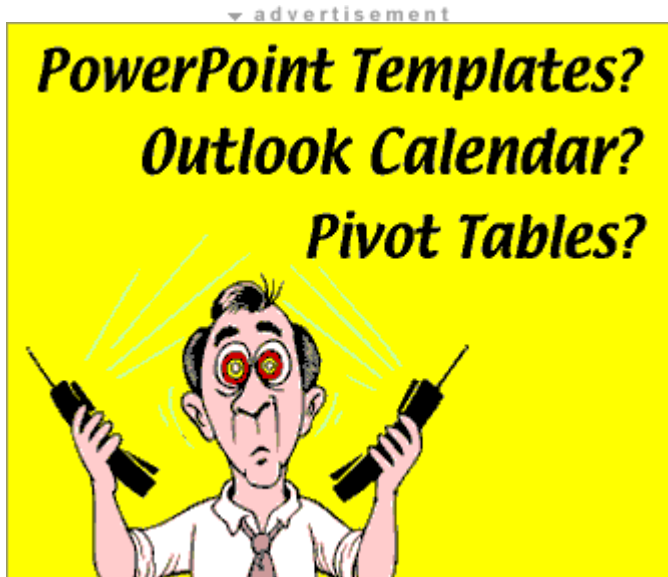
Gartner advises enterprises to migrate a small pilot group of users onto the new production system before moving the general user population. A special group of CSD and desktop management staff should be assigned to support the pilot migration users to refine problem resolution processes before the system goes live. Some enterprises involve the CSD staff in the actual migration so that they gain firsthand insight into the users' configuration. This also helps facilitate problem resolution during the migration. Thus, the CSD can glean key knowledge, such as frequently asked questions, that will be reused during the live production migration.

As the production migration schedule is established, it should be given to the CSD

manager so that additional staff coverage can be planned for the first few weeks of the migration. In most enterprises, the Windows 2000 migration will span a certain number of months—usually six or more, depending on the size and business structure of the enterprise. In this situation, additional staffing will be needed at the outset of each migration.

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2) Develop support and escalation paths
Until all CSD agents feel comfortable supporting the new system, one or two desktop management operations personnel should be assigned as OS experts (second-tier support on the desktop). A third-tier administrator from the desktop administration group should be assigned to work with the CSD second-tier agents. "Work with" can involve knowledge transfer sessions on such topics as client and server differences between the old and new systems. It can mean working on troubleshooting problems together to transition more call resolution from the third to second tier. And it should include working on the test pilot for firsthand experience.

The second-tier agents should train and support the rest of the CSD agents. The result will be faster call resolution and minimized escalation to the third tier. Flowcharting common problem resolution scenarios will prove useful during the early months of the migration and will serve as training aids for CSD new hires.

3) Provide alternative training and support
Training should be required before users are migrated to the new system. Basic introductory training can greatly reduce simple "how to" calls to the CSD within the first 30 days of deployment. There are different degrees of training based on the complexity of the Windows 2000 migration. Classroom training should be required if the enterprise is making significant changes to the OS. For other significant OS changes (e.g., office suite upgrade, messaging upgrade, or server migration), formal training should be required. Attending such training is not always practical for mobile or remote users. They should be offered alternatives, such as audio or video teleconferencing.

Migrations limited to a change in the OS will require minimal training and, in many cases, can be addressed via quick-start documents. These tools should be supplied at the delivery of the updated or new machine. Throughout the migration, the CSD staff should help train users on the new system as part of normal call handling. Rollout progress might be provided on a Web site. Best-practice efforts by the CSD should provide users with self-service facilities, such as just-in-time movies, frequently asked questions, a knowledge base, and other self-support tools.

Alternative support methods, such as having someone onsite for the users the day after the migration and, better yet, again two weeks after the migration, will help keep CSD calls closer to their normal level.

Bottom line
To deliver quality IT service and support, the CSD must be an active partner in the deployment of or migration to Windows 2000. By collaborating, the desktop management and CSD teams can provide a proactive plan for end-user and staff

training. Better knowledge management and problem management processes and capabilities will produce less end-user outages and fewer calls to the support desk.

Gartner originally published this report on Nov. 5, 2001.

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