Implementing Device Lifecycle Management

Background

We were recruited by the group IT function of a UK ready-made foods producer comprising several relatively discrete businesses.

The organisation was ostensibly seeking a roll out of Microsoft Windows 10 to replace older, unsupported versions of the Windows operating system and to replace aged endpoint devices. The group was also seeking to achieve the following, related goals:

- Transition the procurement of IT equipment, especially user devices, from the individual business units to Group IT

- Implement a device lease-back service so that Group IT owned the devices and leased them to the individual business units. This had already been agreed in principle with business stakeholders

- Introduce a device life-cycle management process to ensure timely renewal of user devices to reduce support and TCO costs

- Manage the replacement of devices such that capital costs are evenly spread over time.

Our brief was to initiate the Windows 10 upgrade project and to achieve the additional objectives as part of the project.

What We Did

First, we undertook a review of the resources, processes and technology related to the required changes. We also completed a detailed study of the in-scope user devices to evaluate the scale and impact of the business changes proposed. In parallel we defined and agreed a project governance structure with the client that ensured all stakeholders were involved and consulted throughout the project.

The initial analysis raised some key policy issues which we presented to the governance team for resolution.

Using the analysis and policy decisions we prepared an overall "vision" document describing the proposed future state, how the services would operate and the impact of the proposed changes on the business.

Taking the vision as a template, we developed a project strategy and approach to achieve the stated goals whilst adhering to strict cost limits. The strategy comprised four main elements:

- Immediately transition device procurement from individual businesses to the project as an interim step to enable early introduction of the lease-back service and provide an early deliverable.

- Configure the existing Service Management application (Sunrise) to support the asset tracking, life-cycle management and lease back changes. Further, work with the application vendor to establish a device Service Catalogue and integrated request, approval and delivery process within Sunrise.

- Recruit engineer resources to the project to undertake Windows 10 replacement for specific, high priority groups and locations.

- We established that the number of device replacements necessary to deliver the life-cycle exceeded the capacity of the in-house operations team. The proposal was, therefore, to engage a third party to provide device lifecycle operations as a service.

The strategy was approved by the project governance board and the project instructed to proceed with the four elements.

Transition to Project Procurement

An interim device request and delivery process, and supporting record keeping, was developed, based on the service vision. Project engineers were used for request fulfilment initially while operations staff were introduced to, and subsequently assumed ownership of, the interim process. The new approach was communicated to business stakeholders using IT Business Partners.

Enhance the Service Management System

Having engaged with Sunrise early in the process, we were confident the application could support the service vision. An iterative "design and trial" process was followed to define changes to the application configuration. The changes covered Service Catalogue, device request and fulfilment, asset assignment tracking and life cycle monitoring.
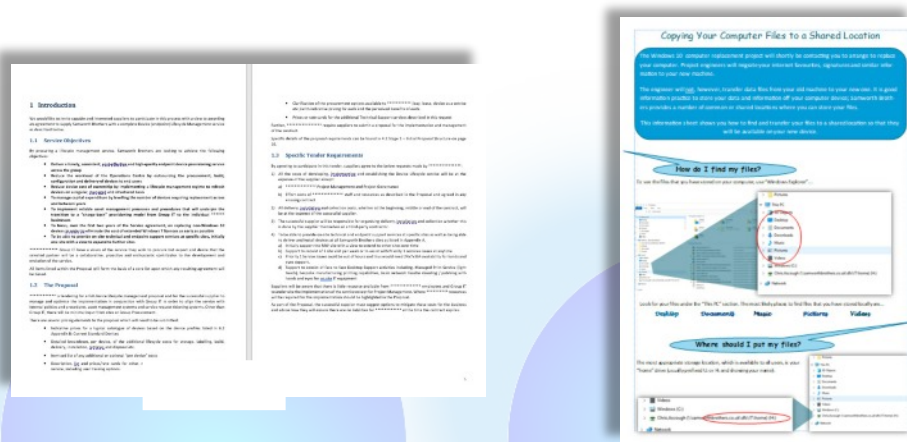
Engineer Resources

The client had insufficient engineer resources to support the project so the governance team approved the direct recruitment of temporary resources by the project. We sought, and found, engineers with a proven ability to manage their own time and to support the project in developing the required procedures to replace Windows 10 and support the transition to the lifecycle vision.

The engineers enabled the project to fulfil early, critical demands for device replacement whilst helping the project to implement the new lifecycle service.

Engage a Lifecycle Service Vendor

Working with the client Procurement team we agreed a process for identifying a vendor to provide the lifecycle service. A selection team was nominated and tasked with defining the key criteria for assessing vendors. Most notable was a desire for a partner that would add value and experience to the evolution of the vision without significantly constraining it.

Candidate vendors were identified and initial meetings held. The service vision document was converted into a Request for Proposal (RFP) and vendors were asked to present their proposals to the selection team. Following the presentations, the team made a unanimous choice.

Results

- The project initiated the process for replacing devices with new, Windows 10 devices and achieved early successes

- New device requests were fulfilled by the project using the interim process. This proved sufficiently robust to support the accelerated deployment of devices to home-workers during COVID-19 lockdown

- The required changes to the Sunrise Service Management application, including a new Service Catalogue, were delivered to the client within budget

- A lifecycle service vendor was selected and subsequently approved by project governance. Initial contract and engagement discussions were commenced

- The COVID-19 Pandemic led to the project being suspended indefinitely.

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