

White paper

# 3 recommendations for successful migration, with emphasis on users



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# 3 recommendations for successful migration, with emphasis on users

Technology is a basic prerequisite for successful migration, while the ability to lead, calm and support users with the right user support is crucial to people's perception of migration as successful - or less so.

## Introduction

**Are you planning to migrate to a new operating system such as Windows 7, or maybe switch to a later version of the Office suite such as Office 2007 or 2010? Technology is a basic prerequisite for successful migration, while the ability to lead, calm and support users in various ways with clear information before, during and after migration is crucial to people's perception of migration as successful - or less so.**

When a decision is made to migrate, the IT department is often given responsibility for project-managing the migration.



The IT department also has to make sure that migration takes place cost-effectively and as quickly as possible without disrupting ongoing operations.

A common scenario is when the IT department succeeds relatively well with the technical migration; that is to say, the IT department manages to move users to the new system without losing vital data or causing stoppages in operations. However, a successful technical migration is no guarantee that the migration project will be perceived as successful throughout the company. Often, "soft" values such as the right information, knowledge and mutual understanding are crucial to whether or not the project is perceived as successful.

If you are interested in how to run a "successful" migration project, you should read this white paper: it provides specific recommendations on how best to handle these "soft" values during a migration and probably increase your chances of success with your migration project. You will be surprised at how you can use good planning, well focused and well planned information and the right user support to make sure that your migration project is perceived as a success throughout the organisation.

In this white paper, we will assume that the basic criteria for the migration project have been decided upon; that is, that the general objective, cost budget and schedule have been specified. The objectives for migrations usually vary, but they can roughly be divided into two different types of target or ambition. On the one hand, there is a migration target which focuses on minimising disruption to regular operations and where few or no resources are invested in training users on the new functions; and on the other hand, there is a migration target which aims to enhance knowledge levels and improve existing working methods in conjunction with the migration.

Therefore, how your organisation should work with each item below will vary depending on the type of target you have for the migration and what your ambitions are. We have divided the document up into three sections.

In the first section, **Lay the foundation in the migration plan**, we discuss what you can bear in mind right from the planning phase for migration in order to achieve successful migration with emphasis on users, and we also provide recommendations.

In the second section, **"Sell" the migration**, we explain about - among other things - the positive effect of making sure users/the rest of the company are provided with the right information on migration and feel they have a part to play.



In the third section, **Provide the right user support**, we discuss advantages and disadvantages of various types of user support in the event of a migration, along with how these can be adapted and altered as migration progresses, depending on the ambition level and resources.

## 1. Lay the foundation in the migration plan

A clear plan for migration, with general targets, subtargets and activities, is an absolute must for a successful migration project. When producing a migration plan, it is important to lay down criteria for the "soft" elements of the project right from the planning stage.

### Take into account what the company needs

Besides following the guidelines and framework specified for the IT department by decision bodies, or on which it has made its own decisions with regard to migration, one challenge involves covering what the company needs. If the project team succeeds in finding out what the company's needs are in connection with a migration on the basis of the situation beforehand and a desired future situation, this will have laid a strong foundation for implementation of a migration which is perceived as successful not only by the management, but also by the company and its users.

The needs of the company should be reviewed from two angles; from a technical angle, i.e. the technical criteria that have to be taken into account in migration, and from a skills requirement angle, which includes information, training and support issues. By carrying out an internal survey with different parts of the company, the project team will acquire valuable information to help it meet the company's needs during migration.

### Analyse and plan rollout according to critical factors at the company

Include users in the project at an early stage. Find out about critical periods when and where migration must not be disturbed. This may be dependent on a number of factors such as technical production, holidays and other considerations. Examine various solutions which make things easier for users and minimise the risk of chaos. Every company has its own critical factors. Here, it is not necessary to ask all users, but to ask representatives of various user groups.

Also, support departments often have interesting statistics which indicate how much various systems are actually used and how many problems and user issues they do actually generate. This can provide a good foundation from which to "develop out" a number of weaknesses in systems and routines. Here, the IT department should perform open prioritisation so that users feel they are being heard and understood; this may provide greater scope for action and better understanding if things go wrong - which they almost always do on one level or another.

### **Analyse and plan the need for skills**

It is also important to examine the company's need for information, training and support. If migration takes place without you offering any form of information point, seminars, training or extended support for users, you may find that people are expecting to learn new things without having either time set aside for this or training at the expense of the company. People's feelings about this are every bit as important as what they actually need. Simply by offering various options and asking what the company's views are on its needs in the event of a future migration, you will have laid a decent foundation for good communication and made people feel someone is listening to them. Find out more in the next section, entitled "'Sell' the migration".

When a company is asked whether its staff want to do training in connection with a future migration, there is often relatively little interest while at the same time the company asks for this if it is not offered. However, there is often always a certain genuine need which may vary within different user groups with different tasks and prior knowledge.

Once the company's (perceived) needs are identified, it is important to compile and report this in order to show clearly what the actual situation is and in order to create understanding for the coming support activities in the form of training and support. Examine different training and support options in order to find a good combination of various support and training solutions which suit the needs of the company and its users. Find out more about various training and support options in the section entitled "Provide the right user support".

## **Appoint an officer to deal with user queries**

Ideally, appoint a member of the project team to stand responsible for information and for training and support issues in connection with migration. It is suggested that this person should be someone who already works with these issues within the company, or is setting up close cooperation with such functions.

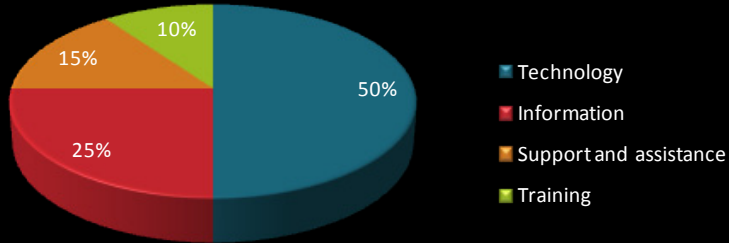
If you do not have all these support and training functions on your side, there is a risk of people thinking that the project is competing with the ongoing operations. By utilising these existing functions and their knowledge and tools, you will have access to a good platform for training and support issues. Migration requires custom initiatives in relation to standard ongoing operations with no major changes.



## **Set aside a financial budget for information, support and training**

It is worth remembering to set aside funding for information for users, as well as for support and training in connection with migration. It is easy to focus on the concrete issues and things to do with technology, which unfortunately means that many people risk placing too little emphasis on information, support and training for the company and its users at the planning stage.

*Example of the structure of the distribution of resources between technology, information, support and training.*



## Summary – Lay the foundation in the migration plan

For a successful migration project, the needs of users should be taken into account right from the migration plan. Interview different parts of the company and plan the rollout according to both the company's critical factors and its need for skills.

Appoint a person on the project team to stand responsible for ensuring that you cover the need for information, training and support for users during migration. Ideally, this should be someone who works with these issues within the company.

Set aside a financial budget for information, support and training to be able to meet the needs of users.

## 2. "Sell" the migration

In a change process – such as migration – you may encounter a degree of opposition from users. In the event of a migration, a common reaction from the company and its users is the view, "Oh no, the IT department are going to swap/upgrade our systems AGAIN!".

If users oppose the migration project and have negative attitudes towards migration, they will be less tolerant of any problems that may arise within the project. Preparing and involving users in the right way can reduce opposition, which may help you to avoid headaches when the technology fails to work as you migrate the systems. Placing emphasis on users can turn the IT and support departments into the company's "heroes" instead of them being seen as "creators of problems" that restrict users.

### Transparent communication on expectations

To reduce objections within the company in the event of a migration project, the project team should explain the benefits of migration and tell people, step by step, how migration will be taking place.

### Explain the benefits of migration

Companies rarely know why migration is taking place and what benefits it will afford; often because there is a lack of information and the members of the migration project have not prioritised the provision of information on this. Explaining the benefits of migration to users helps to create a good foundation for smooth running of the migration project as everyone understands why migration is taking place.

Examples of benefits may include enhancing quality, finding new opportunities, introducing new functionality or reducing costs. It is important to think to remember to emphasise the benefits to users and the company ahead of the benefits to the IT department, which may of course may be every bit as important; but users will not realise this. One example of benefits to users may include greater system accessibility, such as by introducing a web-based version of a program which users can access remotely.

One benefit for the IT department may, for example, be a more centralised and rights-restricted IT environment. However, this does mean greater restrictions for users. Of course, major benefits and reasons for migration for the IT department should be emphasised if they are linked to the IT environment, as well as financial benefits. Often companies are bound by various licences and/or support agreements which require them to migrate their systems to later versions.

To summarise: here, we recommend that you select the biggest, most obvious benefits and the benefits to users and the company.

### **Open prioritisation of the progress of migration**

To reduce negative responses from the company, it is also important to communicate in advance to end-users how migration will be taking place. Explain about the company's critical factors and what stages will be implemented, and in which order. Ideally, refer to earlier surveys of the company's needs.

## **Create involvement during migration**

As mentioned in the first section, it is important to listen to the company's needs in order to lay a decent foundation for a successful migration project. By also involving users throughout the entire change process, you will make users feel that the migration is being "done for them" and not "done to them". This can also create a feeling that migration is a collective project which is being managed by the IT department but which affects and can be influenced by the entire company.

They may then begin to understand that this is a complicated project and that not everything will always go according to plan. The easiest way to create participation is to use clear, updated information, communication; that is to say, giving people the opportunity to put forward their views and representatives on the project team for migration.

### **Start migration with a pilot installation**

Start migration with a pilot installation involving a small group of users. Besides finding problems that you may have missed or discovering that your

calculations are out, this is a good way of making sure that users have additional input when the time comes for the major migration that affects all users. When you implement a pilot rollout, it is important to make it all as authentic as possible in line with the major full rollout to come later.

A lot of people opt only to test a rollout from a technical standpoint in order to see how the hardware and software will work on rollout. Here, our recommendation is to extend yourselves still further. If, for example, you plan to run seminars for users and offer web-based self service, this should also be offered to the pilot group in exactly the same way as in the major rollout to come. Covering all bases and making the pilot as authentic as possible will give you a better foundation and valuable knowledge prior to the major rollout. Once the pilot is complete, it is important to collect the right information on the pilot so as to be able to make the right decisions on any corrections prior to the major rollout.

### **Include users in the project team**

Ideally, include representatives from different parts of your organisation in the project team for migration. In this way, you will create a good foundation from which to identify any views or complaints early on in the project. Here, it is important to attempt to involve the right people who could become good ambassador for the project within their own departments.

### **Call attention to Power Users and Superusers**

Every company has what are known as "Power Users" or "Superusers" who have the ability to use advanced functions in programme which are beyond the capabilities of "ordinary" users. People who are good at using the present environment may feel threatened in the face of the change of systems. Make sure that they are given the same positions in the new environment and become the same good ambassadors that they were for the old system or version. Be aware of their wishes and knowledge. You can show them the test environment, for example, while you are doing your testing. There is a strong link between having a good knowledge of a system and having a positive attitude towards it.

### **Information location for communication**

If there are any delays or technical problems in connection with migration, it is important to clearly inform people and explain why this is, and to open channels of communication so that people can give you their views and ask questions. One specific recommendation is to create a clear location or portal where you collate all information relating to migration. This makes life easier for those of you involved in the project, and for the company and individual users to find correct, updated information by restricting the information to a single location. Here, for example, the IT department can specify the status of the migration and users can give their views and ideas throughout the project.

### **Organise all views expressed by users**

As soon as rollout has begun, you will receive views from users in a variety of ways. Make sure that these are collated in a structured way and dealt with on a rolling basis. Here, you have plenty of opportunity to detect any problems and shortcomings in plenty of time and to respond to views.

### **Space in the schedule for unforeseen technical problems or user requests**

Any experienced project manager will leave space in the schedule for dealing with unforeseen technical problems or late requests from the company and can thereby reduce the risk of creating anxiety within the company and possibly also prevent the company querying migration, the migration plan and the migration project.

### **Summary – "Sell" the migration**

Migrations often bring about opposition from the company as these changes may disrupt people's day-to-day work. This will result in the company becoming less tolerant of problems arising within the project, which they often do. To reduce opposition, migration should be "sold" by creating transparent communication on expectations for the project. This is done by explaining the biggest, most obvious benefits in general and the benefits for users in particular. It is also important to report in advance on how each step of migration should take place.

## **3. Provide the right user support**

When migration to new systems or upgrades of new versions take place, users ask questions that need to be answered. These questions end up in various locations within the organisation, usually at a local or central support organisation (known as the service desk, helpdesk, etc.). 33 per cent of support managers the world over who were asked (in a study of HDI in 2009) are of the view that changes to infrastructure or products such as upgrades, migrations and installations were the main reason as to why the number of calls to the support organisation increased.

By having prepared user support before, during and after migration, you can reduce the number of user questions submitted to your support organisation. There are several types of user support to choose from.

### **Web-based user support in migration**

By web-based user support (or what is known as web-based self service), we mean here that users themselves find the answers to their questions or resolve their own problems by finding the answers in a web-based interface. Here, therefore, no staffed support or training department is required at the actual time of support or training.

On the other hand, skills and resources are required for construction of the content of web-based user support. The point of this format is that one instruction can help any number of users. This is a proactive and preventive working method. Often this assistance consists of supporting material in the form of text and video guides showing step-by-step what users should do, and of training material in the form of e-training in which users have the opportunity to see how things work and to practise in a simulated environment.

78 per cent of Swedish IT and support managers state that they use self service support as a supplement to their staffed support. 9 per cent state that they use self service support as much

as staffed support, and 4 per cent state that users mainly find assistance via self service. Source: CMA Research on behalf of ComAround 2009.

### Web-based user support to assist staffed support



Web-based user support often works as a handy reference work for staffed support when they are answering questions from users on the new system as the system is often new to them as well. With web-based self service, staff on the support team can search by category or subject and call up step-by-step instructions which quickly answer users' questions.

Another point of this working method and support is to allow staffed support to easily mail out links to step-by-step instructions or videos to anyone phoning and needing help. This allows staffed support to cut down the length of calls by sending out step-by-step instructions to support recipients instead of going through all the steps on the phone together.

Staffed support can also stop unwanted calls by themselves ensuring that there are good, clear instructions for web-based self service for the specific query areas which take up a lot of unnecessary time.

More and more support organisations are appointing one or more Content Managers who are responsible for ensuring that the service has the

necessary guides before or directly after the need arises. When migrations take place, basic content is often produced which is then managed by the support organisation/Content Manager together with the provider of the web-based service.

### User support before migration

Before migration takes place, guides should be produced which support the migration in question. You do not need to cover all questions and answers here; you just need to look at what you assume will be the most frequently asked questions. These may involve differences between different versions, the basics of a new system or common applications.

Here, working together with an experienced supplier may be valuable. These companies often have experience of other, similar migrations and so will know in advance what the most common questions are that users will ask, and will have produced answers. The point of taking on board finished documentation is to save time and create scope for producing any adaptations or deviations from a standard environment.

### User support during migration

Once migration starts, it is necessary to focus completely on clearly emphasising the most frequently asked questions and answers in web-based self service. Here, it is a major advantage to have a system which automatically detects what the most commonly asked user questions are and markets these.

At the start of rollout, it is also important to be receptive to any new questions arising and to quickly ensure that the content is adapted in order to meet this need. You can do this yourselves or together with the self service provider. It is often possible to tell from the web-based service what the most common questions are, along with which questions and answers are not included.

At the start of migration, you can also place emphasis on e-training, where users first get to see a new function and then have the opportunity to practise that element in a simulated environment. E-training and microcourses (shorter e-training initiatives) are an effective way of getting users

up and running in a new system. Once users have got started, they will in most instances start asking questions which are more "support-like" in nature, and at this point traditional text guides with illustrations and video guides will work best. Here, users just want answers to specific questions as quickly as possible.

### User support after migration

After migration, when the number of questions relating to the actual migration in web-based self service falls, it is appropriate to adapt the service more on the basis of a "normal situation". Among other things, the support organisation can start to review the content again from a more general support perspective without focusing on the migration that has taken place. The companies that enjoy the best success with good use of their web-based self service are those that are receptive for what users demand in terms of guide types and make sure that their service meets these demands.

To work out what content should be produced, the support organisation can take data from several different places and in different ways. One way is to learn from the knowledge and statistics acquired by the company from the migration that has taken place. Another way is to identify the ten most common/biggest applications and then produce the ten or twenty most frequently asked questions for every application in the form of text and/or video guides for these and present them in web-based self service. Once this content is in place, the service will automatically provide you with all the statistics you need to analyse which elements need to be extended or scaled down respectively.

### Seminars and training for user support during migration

Training and seminars as a means of user support are a very powerful and accessible way of supporting users during migration. The obvious advantage is that this gives the IT and support department the opportunity to meet users face-to-face and respond to their questions and reactions. The disadvantage may be that this is a resource-intensive initiative for the people who hold the training course or seminar, but mainly users who may find it difficult to set aside time to attend this kind of activity.



### Seminars

Seminars are a popular and practical way of meeting users during migration. The difference between seminars and training courses is that seminars are shorter and often held with more people at the time of each seminar. Another difference is that during seminars, users do not have the opportunity to try out the various elements for themselves in the same way that they would during a training course. This means that seminars are often more informative in nature than providers of training. Therefore, the purpose of seminars is not usually to make users fully conversant with a new program; instead, they are designed to provide general information to allow users to progress in the new environment.

Seminars work well together with other support activities as they provide a good opportunity to demonstrate different types of support function. It may be a good idea to take along a spokesperson from the migration project along to seminars, along with an external person from a migration supplier or the supplier of the new system.

When an external person with expert knowledge and experience of other, similar migrations explains benefits and new options, this is often received more favourably by users. It also makes users realise that the company is using external assistance from professionally.

### Training

Training is a more costly type of user support. Training can take place at many different levels, but often it involves sitting for a fairly long time in a classroom, where users work together with a teacher through one or more programs in order to train the users on new functions and to help them to do their jobs using the new programs.

If a company offers its users training in connection with migration, this is often optional for users who feel they need extra support. Sometimes separate training is arranged in connection with migration at departmental level, but this falls beyond the scope of the responsibilities of the migration project and will not be discussed here.

Training in connection with migration usually takes place over what are known as half-day training courses lasting three or four hours so that the company has time to train two groups a day. The number of people doing each course varies, but ideally there should be no more than ten or twelve people. The more people there are, the harder it is for the teacher to deal with all questions and identify a level that suits everyone.

Before the course takes place, users' knowledge levels should be checked in order to ensure that the users initially have sufficient basic knowledge to be able to start to take on board new functions and options. It is common for migration training courses to place a relatively large amount of emphasis on working through new functions and options rather than looking at problems. It may also be appropriate to tell users where they will find more help after the course, such as on the intranet or from web-based self service.

## Summary – Provide the right user support

A lot of questions arise within the company when new systems or upgrades are implemented. These are normally given to the support organisation to answer. There are several different types of user support which enhance users' skills levels while at the same time reducing pressure on the support organisation due to questions being asked.

Web-based user support, or what is known as web-based self service, is a cost-effective way of helping users to find their own answers to their questions and resolve their own problems via a web-based interface. Support material often consists of text and video guides and e-training.

Web-based self service also provides excellent backup for staffed support, who also need new knowledge to be able to help users.

To get the most out of web-based self service, the support organisation should be receptive to the needs of users of guides while the project is in progress – before, during and after migration.

Seminars are another way of providing users with support in the event of migration. Seminars are informative in nature rather than providing training on the new systems or versions.

Training is a more costly type of user support. Training courses often involve people sitting for a longer period of time and in smaller groups than is the case with seminars, and here users are able to work together with teachers to run through the new programs or versions and time is set aside to allow them to practise and test things for themselves.

## Summary - 3 recommendations till successful migration with emphasis on users

In this white paper, we pass on our experiences and discuss how you can implement successful migration with emphasis on users. If, for example, you are planning to migrate to Windows 7 or Office 2010, this white paper contains recommendations and advice which will help to ensure the success of your migration project. The emphasis is on "soft" values in migration, such as information and user support.

In the first section, **Lay the foundation in the migration plan**, we state that a successful project starts with good planning, and we look at the importance of finding out about the needs of users by interviewing people in different parts of the company. We also recommend planning the rollout according to both the company's critical factors and its need for skills.

Finally, we describe the advantage of appointing a person on the project team to stand responsible for ensuring that users receive information, training and support during migration. Ideally, this should be someone who works with these issues within the company so as to prevent the project competing with ongoing business. We also recommend that you set aside a financial budget for information, support and training to be able to meet the needs of users.

In the second section, **"Sell" the migration**, we look at the opposition from the company which may arise in the event of migration as these changes may disrupt people's day-to-day work. This will result in the company becoming less tolerant of problems arising within the project, which they often do. To reduce opposition, migration should be "sold" by creating transparent communication on expectations for the project and emphasising and marketing the right benefits of migration. This white paper also underlines the importance of explaining in advance how each step of migration should take place.

A lot of questions arise within the company when new systems or upgrades are implemented. These are normally given to the support organisation to answer. There are several different types of user support which enhance users' skills levels while at the same time reducing pressure on the support organisation due to questions being asked. In the third section, **Provide the right user support**, we describe three different types of user support - web-based user support, seminars and training - and describe their advantages and disadvantages. We also look at when different types of user support may be appropriate.

Web-based user support, or what is known as web-based self service, is a cost-effective way of helping users to find their own answers to their questions and resolve their own problems via a web-based interface. Support material often consists of text and video guides and e-training. Web-based self service also provides excellent backup for staffed support, who also need new knowledge to be able to help users.

In this white paper, we also discussed the importance of being receptive to the needs of users of guides as the project progresses - before, during and after migration - in order to get the most out of web-based self service.

Seminars are another way of providing users with support in the event of migration. Seminars are informative in nature rather than providing training on the new systems or versions. During seminars, it is also a good idea to take the opportunity to inform people of other support activities.

Training is a more costly type of user support. Training courses often involve people sitting for a longer period of time and in smaller groups than is the case with seminars, and here users are able to work together with teachers to run through the new programs or versions and time is set aside to allow them to practise and test things for themselves.

## About ComAround

ComAround are market leaders in the field of services for web-based self service. We have been developing smart services for more than ten years now, helping everyone working on computers to resolve their problems quickly and easily online. Companies in more than 100 countries are reducing their support costs and improving their service by using ComAround Self Service™ 24 hours a day, 365 days a year. Our clients include companies such as the Swedish International Development Cooperation Agency, Ericsson, Sandvik, Statoil, SEB, Skandia, IKEA and hundreds of smaller companies.

ComAround Self Service™ supports the IT department's work on daily in-house support. ComAround Self Service™ has proven to be invaluable in respect of migrations and switches to new software versions.

*"Utilisation increases whenever new systems or hardware are released. Our interpretation is that ComAround Self Service issues are issues that would otherwise have been referred to us at Support."*

Kerstin Ahlbom – Head of User Support,  
Axfood IT

*"Introduction of the 'Self Service portal' has improved the efficiency of our Service Desk thanks to the support available for rollouts of new IT services and upgrades to existing systems. The 'Self Service portal' is also a great marketing window for the IT department at the Red Cross!"*

Gölan Torun - Service Desk Manager,  
Swedish Red Cross

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