

VITALYST CASE STUDY

Accelerating Change and Adoption of the Modern Desktop for a Leading Retail and Consumer Goods Brand

In early 2018, one of the world's leading retail and consumer goods brands shifted its focus to improve its digital business and was looking to migrate to using cloud-based tools to support those initiatives. While they had always been at the forefront of retail technology, they had not modernized their core desktop environment. And at the time, their IT team was struggling with an ever-growing list of applications and platforms to manage, and the support demands of a large, multi-generational user base.

Challenge

Moving to a Modern Desktop with Windows 10 and Office 365

To address these issues and align to a broader company focus, their CIO sponsored an initiative in the fall of 2018 to digitally transform the organization – a key component of which included an immediate migration to Windows 10 and Office 365. This would serve as the foundation for the company's transformation strategy, providing a common platform for the organization and reducing their administration and support workload, while still providing the tools needed by users to increase collaboration and address their key use cases. Given the importance of addressing these issues, they turned to Microsoft and their partners for help.

The customer understood that the success of any digital transformation project relies upon one key element – the human transformation experience. Given Vitalyst's expertise with [Change Management and Adoption for Microsoft 365](#), and its track record of success with customers in the retail industry, they were asked by the customer to consult and provide analysis for the success of the project.

After engaging with the customer's executive team, Vitalyst's Regional Sales Manager for NY/NJ EOU, Kevin Fitzgerald, connected with his Microsoft Customer Success Unit counterpart to help develop a cohesive strategy to support their transformation effort. Collaborating on an initial plan, they worked together and obtained success funding to provide initial migration support and technical training for the customer's IT and Support teams.

Solution

Managing Change to Drive Successful Adoption

While Vitalyst's Professional Services group engaged on the technical design, the Vitalyst and Microsoft teams met with the customer's L&D and Change Management teams to develop a long-term strategy to enable their migration and employee adoption of the new Modern Desktop solution. The program focused on identifying all potential adoption obstacles and working with all stakeholders to build a cohesive, unified adoption plan.

To ensure that all stakeholders and teams were engaged in developing the solution, Vitalyst hosted a variety of change management workshops. These were executed with both the customer's executive and technical teams.

Identifying and Addressing Gaps in Deployment Planning

During the change management workshop hosted with the customer's technical team, several inconsistencies were identified between the adoption and deployment plans which required additional attention. While the project teams were eager to move forward with an adoption plan, there was consensus that the risks needed to be eliminated before moving forward with



ABOUT VITALYST:

Vitalyst is a global provider of client learning and change enablement services and solutions driving digital adoption and technical proficiency by creating knowledgeable workers through a transformative learning experience.

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the deployment and change management programs. As a result, the customer's CIO asked for Vitalyst's leadership to guide her team and address the issues head-on, which became the focus for the remainder of the technical workshop sessions.

Having worked through similar issues with other retail clients, Vitalyst's practitioners led the process, delivering the necessary support to help the customer to pivot and adapt — quickly building a comprehensive deployment roadmap, including timelines for deploying prioritized workloads: Exchange Online, Office ProPlus and OneDrive for Business.

Upon completion, the Vitalyst team resumed work with the customer's broader team, gathering input to fuel their analysis and producing plans for eight key areas including: Communications; Sponsorship; Coaching; Training; Resistance Management; Adoption Measurement; Change Network; and Rewards and Recognition.

The approach was successful in establishing a common vision and buy-in from relevant teams and sponsors, providing a common understanding of the goals of the project and the potential impact of the migration. And ultimately, would set the foundation to drive successful adoption and active use by employees, without causing business disruption.

Knowledgeable and Empowered Employees are in Fashion

Based on the core activities identified in the workshops, Vitalyst's Digital Adoption Solution integrated its world class "How-To" help desk support option, to be accessed by the customer's users directly from the current help desk IVR. Having immediate access to Modern Desktop support has already made a positive impact regarding the strain on help desk resources and how IT support is perceived by their employees.

Employees have expanded access to support, setting the table for a smooth transition to Windows 10 and Office 365, and allowing them to take advantage of the new features within their new productivity tools. The support serves as a scalable solution for all employees and is complemented with a rigorous

curriculum of live on-site and virtual training to help business users sharpen their skill sets with persona-based content.

Continuous Learning to Stay Ahead of the Trend

The power of Office 365 is that, as a cloud-based solution, new features and capabilities are constantly being rolled out from Microsoft. At any given time, there are hundreds of updates on Microsoft's roadmap being developed, rolled out or launched. Staying on top of every update, patch, new feature and enhancement and trying to understand which ones are the most relevant can be overwhelming and quickly strain the productivity of both IT and end-users.

As such, this customer understood that a clear transfer of ownership of Office 365 adoption and readiness was needed at the end of the deployment project. To ensure that their employees will be able to take advantage of relevant new features and functionality in Office 365, their post-project transition strategy centers around implementation of Vitalyst's Active365 Managed Service for Continuous Learning.

As part of the ongoing service, Vitalyst's Active365 team will monitor all updates and changes available on the Microsoft 365 roadmap. Then they will analyze and determine, using migration data from customers, which of these will be the most critical and impactful to the customer's end-users. Vitalyst's team will provide communication assets to ensure that end-users are aware when changes are coming. Then they will develop and share training assets, ensuring interactive and responsive support for the customer's employees and accelerating their adoption and active use of these new capabilities within Office 365.

This enterprise solution will enable this customer to be more agile and to take advantage of new opportunities for innovation—all aligned to the company's vision to align their employees and tools to deliver a better digital experience both internally and externally.