REVIEW: ManagementStudio

Part IV- Exploring the 4C's Methodology for Delivering Projects - COMMUNICATE

Peter von Oven
End User Computing Subject Matter Expert

The Third 'C' is for COMMUNICATE

Welcome to the penultimate article in this series of ManagementStudio reviews of the 4C's methodology where I am going to take you through the third of the 4C's; COMMUNICATE. This, in my opinion, is *the* most critical part of any project and can either make or break the entire project in terms of whether it is deemed a success or failure. Regardless of what the project team may state in saying the objective has been met, others may have a different view.

Why is communication so critical you ask, given that I have also suggested in previous articles that all the other parts of a project are also equally as critical. While collecting data and controlling that data are of course key to any project, you can't do without accurate data, and that for me is a process that is very binary in nature. By that I mean data is collected and then put to work automatically by the project team. It doesn't look at the data, it is just captured and then acted upon. But in doing this you are missing out on one critical factor. The human factor.

The human factor, as I call it, is twofold. First, is putting context around your data. How are applications being used, are they the right applications for the user and if so, do they work as expected? Do they even use those apps? What other devices do they use and are there ways to improve the end user experience? Data capture isn't going to tell you any of this.

The second human factor is, as the 4C methodology in this review states, communicate. Quite simply tell people, those affected by the project, what is going on. Keep them involved and up to date with relevant information, but more than that, involve them. Don't treat them like mushrooms as the saying goes. If you don't know what that means I'll let you Google it!

By involving those that are affected by the project or who come into contact with particular phases of the project then it gives them a voice. A chance to provide real time guidance and feedback that, when it comes to project sign off time, becomes easier to gain acceptance as there should be no objections or surprises.

_____

If you have read any of my previous articles, then you will be familiar with my book analogy in describing the characters and their journey through the different project phases. Communicate is how we tell that story. But not only that, and for those of you of a certain age, it is almost like choosing your own adventure story, with your workforce providing guidance in helping drive the project in the right direction. That direction being a successful outcome for all involved.

It will come as no surprise when I tell you that ManagementStudio has an integrated communication platform. And yes, while it may well be email driven, it provides a two-way street and rather than just tell people information; it asks for interactive feedback too.

Invite People to the Project Party

It is always polite to invite people to the party. In this case your project. With ManagementStudio you can create your own custom email templates and, more importantly, make the emails engaging by actually personalising them using the data that is captured. For example, simply addressing the user by their name is already a good starting point. Of course, being able to use your company branding goes a long way too.

To enable this, emails are made up of two elements : First is the email wrapper that contains things like the header, formatting, and layout of the email. This means you can manage the look and feel centrally. An example of the wrapper design screen is shown below:
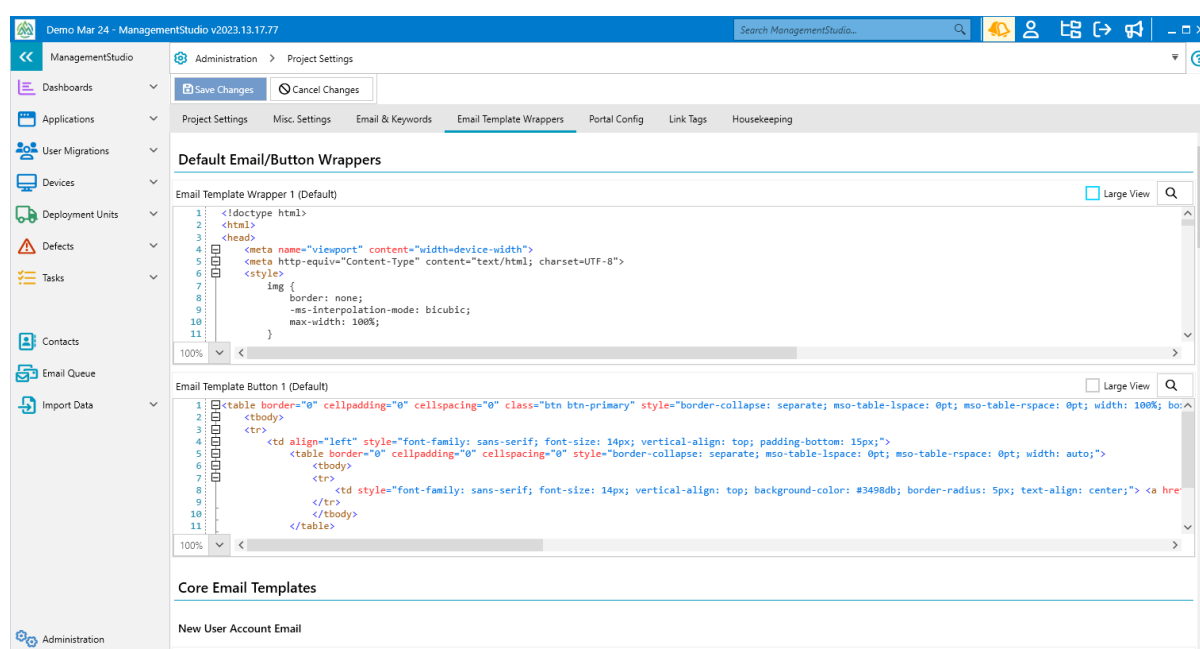
The second element is the body of the email, i.e. what you are communicating to the user and email recipient. The email templates are first categorised using the core ManagementStudio modules, so Applications, User Migrations, Devices, and Deployment Units.

Drilling down to the next level on any of those core modules will allow you to manage the email templates for that chosen module. Then, within that module you can create the emails that you need that are relevant to your project. As well as the welcome email, these could be survey emails, emails that allow the user to schedule their migration timeslot, or a set of email replies that are triggered once a user has completed a task or phase.

_____

Maybe they returned a survey and so an automated email is sent thanking them. Equally it could be a reminder that they haven't yet replied. As you can see from what I have just discussed, emails can be sent via a time schedule or a triggered event. All automated.

So, back to the email templates. As I said, you can create whatever is required in order to communicate with your users. The example below is an email template to invite users to the project. I've also shown that you can optionally switch to a different email wrapper by clicking on Email Wrapper which will show the option as a new column from where you can choose from the email wrappers that you have created. I've shown the email editor dialog box.

There is one thing I want to highlight and that is the conditional emails field.

In this example, the conditional emails are based on different languages. The welcome email in this example has been translated, by the project team, into different versions, all created as child emails from the main parent email, with each child being the same email subject but in a different language. This example uses French as the language for an additional project welcome email. I'ts just worth highlighting the fact that ManagementStudio doesn't do the translation for you, you will need to write the email in the chosen language. Another good opportunity to get other people engaged, those with language skills.

You then set the condition for ManagementStudio to check for a specific value that needs to be met before sending the email. In this case, where the language is to set to French or the country is set to France.
Going back to making communication personal, I think this is a nice touch to communicate to the end users in their native language.

I've covered some of the foundational features on how to configure emails from the engine room perspective and how they work, and so next I want to talk about the different types of communications you can send using this mechanism such as surveys, feedback requests and

_____

_____

self-service scheduling, but before I do, I wanted to just share an example of that welcome email that I used as my examples:
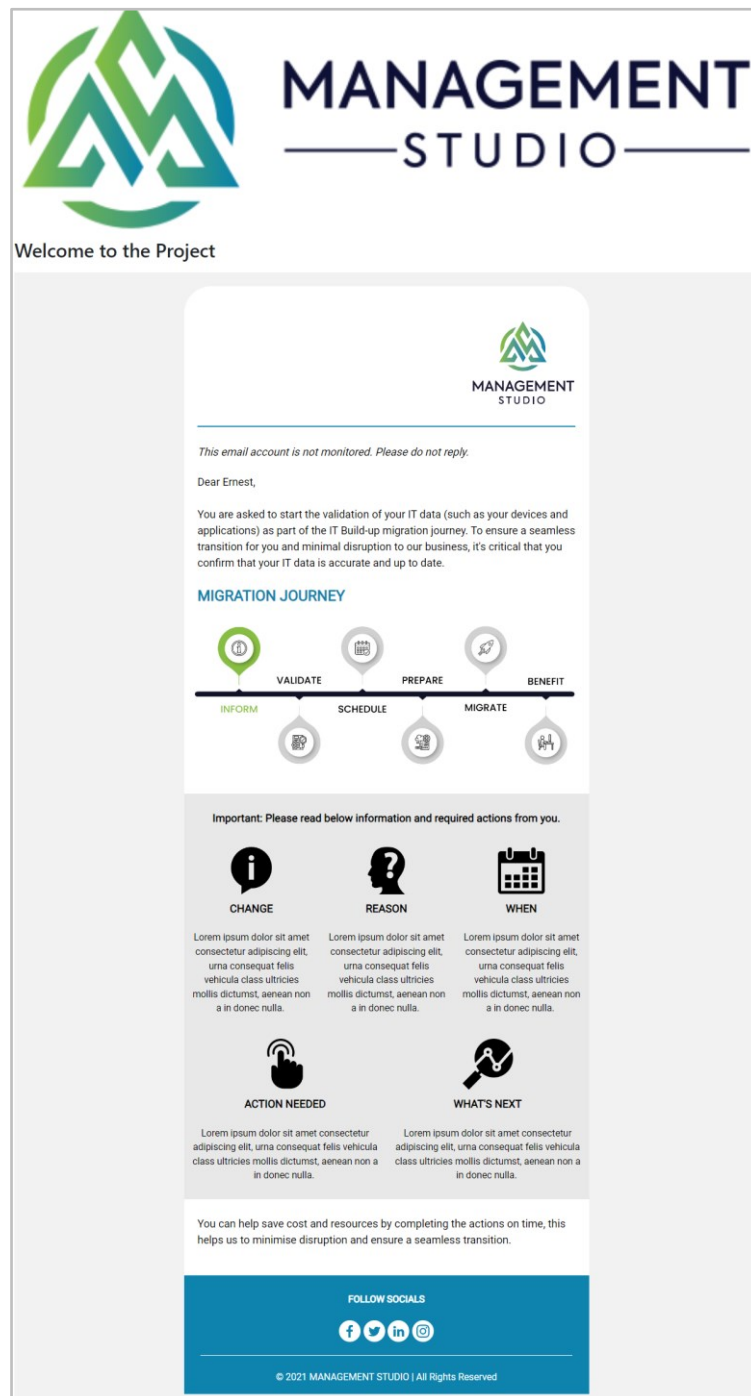
I'm sure you will agree that this is far more engaging and informative than the typical plain text email that you would typically receive.

Next, I want to look at some of the other types of communication ManagementStudio can provide.

_____

Ask the User

As I have spoken about previously, you should always seek user feedback at every step along the way throughout your project. Whether that is asking people about the project right at the beginning, requesting additional information, or just asking people to complete surveys on their overall experience of the project once completed.

Back in my review of the first of the 4C's, Capture, I talk about an example of where your directory service has not been updated and therefore could potentially contain inaccurate information and data. By asking the user directly, you can confirm the information is correct.

For example, in the directory service it may have their location as the Edinburgh office. However, they have now moved roles and are now based in Southampton. When it comes to migrating them you would be expecting them to be in Edinburgh. The directory services are not always kept up to date, but by sending out a user survey to actually ask them to proactively provide information, you can help your project to become more efficient. If you remember, you can even get ManagementStudio to update this directory information automatically by the power of APIs and PowerShell.

In this example just imagine trekking up to Edinburgh for this user, only to find the user is hundreds of miles away in Southampton.

You could also ask them about the device(s) they use, any specialised peripherals they use, and another good one, and based on the applications that were captured and listed against their name, are there any of those applications no longer used yet are still installed?

As with all the communication features in ManagementStudio, you have complete control over what you send out to your end users and the questions you ask. This is shown in the example survey creation page from the administration console:
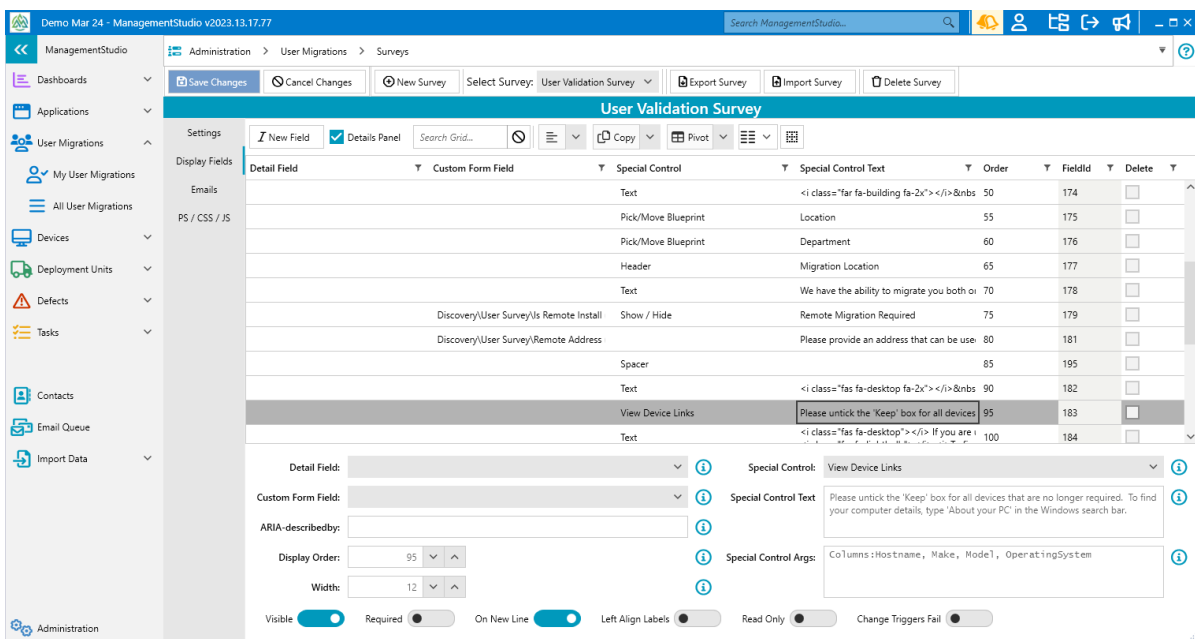
The information is simple for end users to complete, consisting of drop-down menus and check boxes.

The key here is to make it simple and not too onerous to complete but ultimately that is down to you as you have full control over surveys.

To see an example of this form in action, click here to watch a video example of an end user completing a survey.

The previous example was more of a general information gathering exercise, but there may be the need to capture more detailed information on a specific application or a specific piece of hardware. Again, you can create a more specific survey request based on that one application or that one piece of hardware.

Once the survey has been completed successfully, in ManagementStudio speak the survey has been 'passed', then the end user can automatically be moved to the next project process using the information provided. This could include updating the directory services if required. If the end user doesn't agree with the information, or raises questions, which is referred to as 'failing' the survey, then they get put in the queue for one of the project team to review why.

Maybe more information is required. Maybe they are not ready for migration due to an outstanding issue. Regardless, this helps with the project progress and overall management, and, again, puts the end user front and centre when it comes to communicating.

Testing times are ahead

In our communication overview we have so far looked at requesting additional and more generic information or asking specific questions about a particular application or piece of hardware, but there is another great use case for using surveys and the ManagementStudio communication platform, and that use case is for testing purposes.

_____

_____

It goes without saying that if you change anything that is user-based then you need to test it. In my experience the majority of this testing is typically undertaken by the IT teams who decide whether something works or not, but in my opinion, this is where projects often go wrong.

In the eyes of the IT team, and not by any fault on their part, the testing of an application is based on whether or not it loads and whether or not you can type or click on the menus. I'm sure you will agree that that is not really testing, yet I'm sure we've all been there. It may be a specialised applications and the IT team don't have any experience of how it *really* works. That being the case then the only people that can sign the application off as fully functioning are the application owners and users.

I've had first-hand experience of this when working with a CAD application that was migrated to a new platform. The IT team tested it and yes it loaded, and yes you could navigate around the app, but when a user tried to load a 3D model and then tried to manipulate that model, it all fell apart. That was chalked up as a project failure as the application was unusable, the cause of which was potentially based on a lack of communication and gaining end user feedback before moving into production.

Therefore, you need a mechanism to ask the right questions and capture this "does it work properly" information. This is where ManagementStudio can turn the survey feature into a questionnaire that is designed to capture user acceptance testing and ultimately gain project signoff.

This survey can be targeted at just those users that actually use the application, using the conditional email feature, as well as maybe the departments that use the application and locations that use it. All using the deployment unit feature.

And to gain even more communication brownie points you could ask the application owners to write the survey themselves so as to leave no stone unturned but, more importantly, to guarantee a successful outcome. That is if the application works of course.

As I come to the end of the communication overview, I thought it important to finish on one last really cool feature; that feature being self-service scheduling.

_____

Self-service scheduling

Now we have all the information we need, collected automatically from our first of the 4C's, Capture, and refined with the third of the 4C's, Communicate, (I did say the 4C's are all tightly integrated) it is time to start actioning our project and start migrating people.

With that in mind, I, as part of the project team, will just randomly pick a user, a date, and a time, and start their migration purely based on the fact that they have hit the 100% readiness phase in ManagementStudio. Is that a good idea?

I can already hear the ManagementStudio team shouting at me to stop! What are you doing? How do you know they are actually ready? Are they on holiday? Do they have important meetings booked that you would disrupt? Moreover, I've just spent this article demonstrating on how to put the end user first in everything ManagementStudio delivers as part of its integrated communication platform, yet here I am prescribing when they are going to be migrated.

So, I will stop and instead talk about the self-service scheduling feature. Rather than the project team deciding on when a user gets migrated, instead, send them an email and a link to the ManagementStudio portal that allows them to select a time and date that is convenient for them, as shown below:
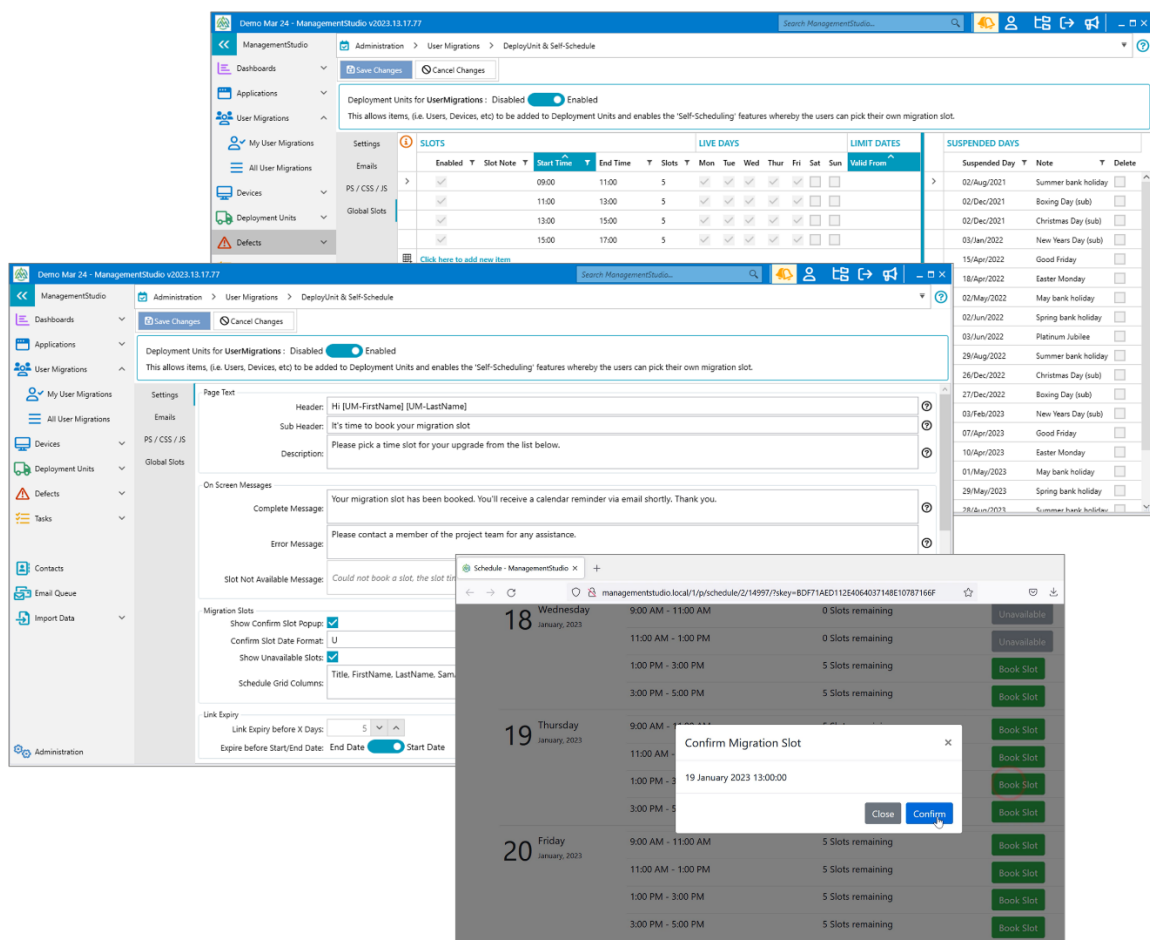
Ultimately this feature puts the end user in control of when they get migrated, as they also have the ability to reschedule if required. It also enables the IT project team to schedule their time and know exactly when users are being migrated, and trigger automation tasks at that date/time such as adding the user's account to the required deployment groups. The project team can also report on who is left and who hasn't been scheduled.

Summary

In this fourth review, I have given you an overview of the penultimate 'C' of the 4C's methodology, and that is Communication. I know I keep saying each one is probably the most important one of all, but when it comes down to working with end users then communication probably does, and rightly so, trumps all others.

Whether it is just telling people what is going on, to allowing them to help tell part of their own story. Remember at the start of the article I mentioned the choose your own adventure story? Well, hopefully I have gone some way in demonstrating this is where end users share what they have, how they work, and where they work from, right down to deciding when their adventure starts, and they are migrated.

With ManagementStudio and its integrated communication platform you have the ability to communicate with your end users every step of the way. From that introductory email, through to requesting additional information and allowing them to schedule their own migration time. I can't stress enough how important it is to get engagement at an early stage of any project if you want it to be a success and continue that communication right up to the time of migration and even after with follow up check-ins to ensure things are still working correctly.

Whats Next?

In the final article I am going to discuss the last of the 4 C's with COLLABORATION and explore the features and capabilities of ManagementStudio and how to invite others to join your project.

In the meantime, if you want to see ManagementStudio in action, then head over the web site for a demo- https://managementstudio.com/demo/

About the Author

Peter von Oven is an experienced technical consultant working closely with customers, partners, and vendors in designing technology solutions, to meet business needs and deliver outcomes. During his career, Peter has presented at key IT events such as VMworld, IP EXPO, and various VMUGs and CCUG events across the UK.

He has also worked in senior presales roles and presales management roles for Fujitsu, HP, Citrix, and VMware, and has been awarded VMware vExpert for the last ten years in a row including vExpert EUC, vExpert Pro, and now the new and as yet unnamed Omnissa EUC Expert community.

_____

Today he works with partners and vendors helping drive and deliver innovative technology solutions. He is also an avid author, having now written 18 books and created numerous videos on the subject of VMware end-user computing solutions.

In his spare time, Peter volunteers as a STEM Ambassador, working with schools and colleges, helping the next generation develop the skills and confidence in building careers in technology. He is also a serving Royal Air Force Reservist currently working as an instructor with the Air Cadet organisation.

_____