



Insight Managed Deployment

Best practices

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Executive summary

Insight works with clients to identify, build and implement appropriate IT solutions. As a complete IT services and solutions provider, we help organizations transform technology, operations and service delivery to meet business challenges.

This paper offers critical reflections on best practices for managed deployment in order to deliver an exceptional client experience and results for clients within every vertical.

Managed Deployment

Who are we and what do we do?

The Managed Deployment team provides our clients with peace of mind through IT transformations, enabling our clients to focus their in-house talent on supporting other crucial projects.

Work smarter. Seamlessly connect employees and organizations with the tools and support workers need to be productive, engaged and inspired.

Roll out new technology with confidence.

Deploying new technology to multiple sites requires coordinated and consistent collaboration from internal stakeholders, external partners and third-party service providers. We'll coordinate your entire rollout from the initial site survey and analysis to end-user support. Because we can work on multiple locations simultaneously, you see a faster return on your investment. Plus, we'll show you how to make smart technology decisions that go beyond specific purchases and increase the value of your overall budget.

IT deployment — on schedule and within budget

Deployments across multiple sites need careful attention to detail so small missteps don't lead to big delays. Our command center provides status updates and real-time reporting capabilities to keep everything running smoothly. You'll get a dedicated project manager who will track and monitor quality assurance and make rapid adjustments to solve problems. And we'll be ready to dispatch and track technicians anytime.

Creating a better client experience

Insight Managed Deployment provides consistent and seamless end-user experiences. With consolidated and streamlined rollout from procurement to refresh, technology cycles are shortened and downtime is minimized.

Services for devices from point-of-sale systems to desktop computers include:

- Installs, moves, changes and refresh
- Shipping and logistics
- Scheduling and reporting
- Standardized processes and governance

Benefits



Optimize on-site install time.



Reduce cost.



Drive quality and accuracy.



Scale seamlessly.



Improve end-user experience.



Ensure consistent outcomes with proven results.



Minimize negative impact.



Speed time to deployment.

How to set up your deployment projects for success

Our deployment approach

Multisite deployments are more successful when everything is housed under one roof. From conception to ribbon-cutting, we have the resources and expertise to deliver complex projects.



Pilot

Investing time in a pilot will help identify risks, complexity and time-to-value challenges before deploying at scale.



Technology installation

Insight’s open solution model customizes every deployment based on your preferences and limitations.



Post-implementation support

On-demand assistance provides next business day or scheduled support for continued service after deployment.

Framework for success



Project management office

- Standardized project workflows
- Plans built with a focus on success criteria
- Ensures outcomes and project success



Insight Command Center

- Certified field technicians
- Tiger teams for white glove services
- Maintenance and issue resolution
- Communications via field services app



Insight systems and tools

- Intelligent scheduling and dispatching
- Real-time field tools and optimization processes
- Logistics and fulfillment
- Cost management tools



Regional technician leads

- Understand client challenges and proactively offer solutions
- Collaborate with client and project team to stand up Proof of Concept (PoC) and pilots

We help clients transform IT and realize meaningful outcomes.

Impacts



Scalability in the field



Dedicated project management



Maximizing hardware ROI



Consistent planning and reporting for risk mitigation



Adherence to project timelines

Why Insight

30+ years

of experience with technology implementations

14,500

managed technicians across

500,000

supported devices

~43,000

complex assignments delivered per year

What makes the Insight Managed Deployment team best in class?

① Client collaboration comes first.

What does our experience tell us?

When a client asks for help, they have a specific problem they need to resolve. Our challenge is not only solving that problem but identifying and addressing the underlying issues that led to it. We have found these two elements are not always mutually exclusive — solving the problem for the client before identifying the underlying issue can at times be a missed opportunity.

Best practice

Take a collaborative approach instead of leading with a solution. We view every client as a partner and work closely with our presales and sales teams to better understand the why behind our client's specific problem. In order to successfully deploy any technology or process, it is imperative that we truly understand what our clients are trying to achieve first.

② Experienced project managers

What does our experience tell us?

Managing a project without an experienced project manager is akin to a bow and arrow without an experienced archer: Without an experienced project manager, the project is destined to fall from the mark. It is imperative that the right project manager be identified and assigned to each project.

Best practice

Our Project Management Office (PMO) is equipped with a wide breadth of talent that includes years of experience within every vertical. It is imperative for the delivery team to work with the solutions architect to ensure that the right project management resources are scoped into each project with a laser focus on ensuring the right level of effort is built into the pricing model.

③ Leverage regional technical leads and training videos.

What does our experience tell us?

Successful projects rely on qualified field technicians executing on a well-crafted plan. However, when regional technical leads and training videos are not used, plans are less successful because field technicians are not equipped with the right knowledge or tools.

Best practice

At Insight, we start by scoping in a regional technical lead to Scope of Work (SOW) when applicable. Regional technical leads are senior technical engineers who will go to one or more client sites during the pilot phase and will work with a videographer to document field procedures. For this effort to be a success, we insist that the regional technical lead take a collaborative approach with the client in the development process. The procedures and training materials are then published to ensure a consistent experience on-site.

④ Perform site surveys and a project pilot.

What does our experience tell us?

Every business wants to make sure that any change to its technology, processes or people is fully understood before making that change. In order to provide this understanding, the project plan will have to be tested and validated before implementation begins. However, unpredictable or volatile factors can cause significant risk to scope, schedule and cost. When this occurs, it is tempting to take shortcuts that can cause projects to go off the rails.

Best practice

Perform site surveys and a project pilot. Effective deployments use repeatable processes that enable the project team to plan, schedule, control and test the PoC. However, the inherent challenge in each deployment is coupling those repeatable processes within the client's existing infrastructure. In fact, many clients are unaware of their existing infrastructure, so it is imperative for Insight to gather this critical intelligence from the field for the project to be a success.

⑤ Field Service Executives (FSEs) and Service Delivery Managers (SDMs) provide project governance.

What does our experience tell us?

FSEs and SDMs are the glue that makes success stick, as they provide governance to ensure projects go according to plan. They are the stewards of the business who are empowered to make decisions in the best interest of the client while maintaining go-to-market solutions that will help drive new and/or repeatable business.

Best practice

The Managed Deployment team uses FSEs and SDMs to provide governance over projects from inception to client handoff.

⑥ Leverage Insight Command Center (ICC) to manage field resources.

What does our experience tell us?

The truth is that no matter the size of a project (or portfolio), the logistics of managing field technicians is very complex. ICC is a dedicated field service management team that manages the resourcing and on-site experience of our field technicians.

Best practice

ICC supports the project team to prioritize, manage and assign technicians. The objective of resource prioritization is to induce quality by reusing top-rated technicians to drive efficiency and improve the client experience. ICC has developed a standard of excellence that our technicians must meet. In the event a technician is identified as a poor performer, that technician is removed from our global talent pool for future projects.

7 Insight Certified Resource (ICR) program

What does our experience tell us?

Projects are positioned for success when you have trusted, qualified technicians. Without them, you risk an array of performance issues ranging from no-shows and late arrivals to lack of preparation or qualifications. The ICR program provides qualified contract technicians from Insight's talent pool who are vetted and have been used on other Insight assignments.

Best practice

The ICR team regularly seeks out highly rated independent contractors across multiple platforms with the intent to onboard them as candidates for the ICR program. Once accepted, ICR resources are preferred resources deploying at scale. Acceptance into the ICR talent pool means that the technician must adhere to Insight's standard code of conduct, dress code and demonstrated soft skills. Additionally, candidates must have an active background check and drug test on file.

8 Tactical pause

What does our experience tell us?

When planning a project, teammates and stakeholders will consider possible obstacles. But there may still be some unforeseen roadblocks during the discovery phase. In order to get the project back on track, the project team must take time to identify the issues that have changed the project's trajectory and understand how it changed in the first place.

Best practice

When the project team encounters a roadblock, a tactical pause should be called to reevaluate the project's direction. This tactical pause can be called by anyone on the team. The intent here is to give everyone time to assess and process the obstacles at hand before trying to identify the best path forward.

9 After Action Review (AAR)

What does our experience tell us?

Most projects contain a lesson learned element as part of the project close: The project manager studies what went wrong with the intent to decide which processes to keep and what should be done differently on future projects.

Best practice

An AAR is designed to occur after each milestone, enabling the project manager to make any necessary course corrections to deliver the project successfully. A true AAR is an ongoing process that shares critical lessons learned with all project members and stakeholders.