
Business Case Template
Windows 7 SOE

Consulting Cloud Preview

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This is an agreement between the Sponsor and Project Manager (at a minimum), on the detailed requirements and related activities for implementation of the project as understood at this specific point in time. Consider the aspect of 'buy-in' and support when identifying signatories.

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1. EXECUTIVE SUMMARY

1.1. Context

The majority of Company X's fleet of 3,500 PC's operate on the ageing Windows XP operating system which is near end of life. Since XP, Microsoft have released both the Vista and Windows 7 operating systems and ceased developing enhancements to XP in 2009. They currently only release security updates for XP and this limited support will end in April 2014 presenting a significant level of risk to Company X.

11 years after its release, many software and hardware vendors are following Microsoft's lead in removing their support for XP. As a result, increasing amounts of new release software no longer work on XP, for example Microsoft Internet Explorer 9.

Given that the release of Windows 8 is expected later this year, we have assessed two main options for the replacement of XP, either upgrading now to Windows 7, or waiting until Windows 8 is ready for rollout and upgrading directly from XP to Windows 8.

Other options, such as partial deployment of Windows 7 to key Company X sites only, were considered but have not been included as they do not result in significant cost savings, and yet defer the realisation of benefits by several years.

1.2. Option One – Windows 7

A standardized and well managed desktop environment (SOE) based on the latest Windows 7/Office 2010 desktop operating environment for the entire organization can be deployed within nine months and will provide immediate benefits including:

- Greatly improved security
- Improved performance of systems through 64 bit processing
- Greater IT process automation by use of application packaging and automated builds
- Rationalisation of Company X's application suite (expect to reduce by ~100 from the current 300+)

In addition there are several key IT projects in flight that have a dependency on Windows 7 including Newsys and MS Lync. Windows 7 will also act as an enabler for many initiatives such as the planned Treasury systems upgrade.

There are many applications which perform significantly better on Windows 7 than XP. For example most users of Mapware have asked to be upgraded to Windows 7, and Portal Integration performance will also be improved under Windows 7.

Company X is already licensed to upgrade the entire fleet to the latest versions of both Windows 7 and Office 2010 under our Microsoft Enterprise Agreement.

The technology strategy roadmap anticipates retaining the Windows 7 for 5-6 years, by which time other initiatives such as application virtualisation will make migration to future Windows versions far less complex. It is likely that at this time Company X will skip Windows 8 and move directly to Windows 9.

A Windows deployment represents a major undertaking that impacts significantly on every IT user across Company X. Therefore it is critical that the project is carefully managed to ensure successful delivery and minimal disruption to Company X operations.

- Importance of running Windows 7 as a Company X wide project (as opposed to ad-hoc upgrades):
 - Ensures training and change management needs are managed
 - Full benefits realisation and productivity gains
 - Less disruptive to individual users
 - Other projects with dependency on Windows 7 can realise full benefits
 - Provides structure to ensure completion in timely manner and within budget
 - Control costs through greater visibility (if done via operations true cost is obscured)

In addition Company X is currently undertaking an RFP process for the management and support of the desktop environment. A standardized Windows 7 enterprise wide desktop environment will greatly reduce complexity and management overhead which will result in improved service levels and avoid additional managed services costs.

1.3. Option Two - Windows 8

Microsoft has not yet announced a release date for the successor to Windows 7, although media reports speculate that it may be released around October 2012. Windows 8 is primarily targeted at the consumer market, and designed to run on both tablets and traditional PCs. It is unlikely to provide significant productivity improvements to the corporate environment.

The option of migrating from XP to Windows 8 is not recommended for a number of reasons:

- No release date has been announced for Windows 8 as it is still in development. Media reports indicate a potential release date of October 2012, however Microsoft release dates have a history of slippage¹. Based on previous experience, rollout of a stable product will not be possible until end 2014 at the earliest
- Windows 7 is a proven and current platform. This is not always the case with Microsoft operating system releases (e.g. ME, Vista)
- Windows 8 contains significant changes and as a result will be 20-30% more expensive to deploy due to additional training and application compatibility costs
- Company X IT estimate that it will be at least 12 months after its release before Windows 8 is sufficiently robust to deploy – this will leave us exposed to running XP security patch support has ceased in April 2014
- Suitability to the Company X application environment upon release is unknown (application software is traditionally slow to gain compatibility with new operating systems)

¹ For example Windows Vista was originally scheduled for release in 2003, but eventually shipped in 2006