Enterprise modernization Strategy Workshop



Delivery Guide

Prepared for

**Microsoft Services**

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1. Introduction

The Enterprise Modernization Strategy Workshop is a 1-day 1:1 customer session aimed at discussing the Industry trends driving the need for modernization, the benefits of modernization and the value it brings to enterprise customers, the customer strategy and drivers for modernization (Business and Technical) and the Microsoft approach to enterprise modernization. This workshop should help guide the customer to identify and prioritize key projects, and to mutually identify the next steps towards an application migration from Windows Server 2003 to a modern OS.

A Solution Architect or a Modern Datacenter COE Architect delivers the workshop itself, but the preparation work requires ATU involvement. The ATS or SE is expected to perform the initial TDM or BDM presentation to the customer in advance.

1. How to Prepare for the Workshop
   1. Logistics

The ATS must schedule the workshop with the customer. The solution architect that will deliver the workshop needs to ensure that:

* Preparation calls are scheduled
* Customer qualification is appropriate
* Workshop outcomes are tracked
  1. Pre-Workshop Work Back Schedule

This is the recommended work back schedule in preparation for the workshop:

* **T-10 days**: Prep call 1 – happens once the workshop date is locked. Attendees are ATS/SSP/TAM/Enterprise Architect/Solution Architect. The ATS owns scheduling the call. Call agenda is as follows:
  + Customer background
  + Customer current state
  + Assessment status (Discovery and Rationalization)
  + Level of previous customer exposure to Microsoft datacenter messaging – e.g. Immersion event
  + Determine customer’s level of understanding of Microsoft’s investment in Public Cloud datacenters and the experience we bring to the table.
    - If the customer has a deep understanding or if a presentation on that topic has already been given, then do not present the full section from Day One delivery presentation
  + Summary of opportunities in play - Services and EPG
  + Finalize high level workshop agenda - for ATS to take to customer for customer input
  + Set expectation on level of depth (200) - no product SME's, these are taken offline for future meetings
* **T-5 days:** Prep call 2 – attendees are ATS/SSP/TAM/Enterprise Architect. The ATS owns scheduling the call. Call agenda is as follows:
  + Lock agenda for the workshop
  + Review final attendees and roles
  + Lock on specific results to achieve from workshop
  1. How to Use the Optional Light Business Case

Modernizing a customer’s infrastructure and applications is a major undertaking, especially if the enterprise is large, complex, multi-site, multilingual, or global. The customer may have such questions as: What return on investment (ROI) can I anticipate from this solution? How can I uncover and quantify indirect benefits? What should I budget for? How can I communicate this information to other stakeholders at my enterprise?

The **light** business case tool can estimate the typical ROI for modernizing applications and infrastructure based on a customer’s preferred target (On-Premise or Cloud) based on industry standards. The goal of the light business case is to provide a high level overview and potentially sell a customer a full business case that provides real numbers reflective to their business. The **full** business case is an industrialized service that provides a quick turnaround (typically 3 weeks) to generate.

Benefits of the **full** business case include:

* High-level overview and supporting details of where and how benefits will accrue from modernizing your applications and infrastructure.
* Projections of ROI, net present value, and other financial measures, with comparisons to industry benchmarks.

The **light** business case can be accessed [here](http://roi-eos.cloudapp.net/ENDR_Lite_BC_Tool/WelcomeScreen.aspx).

* 1. Workshop Readiness

Estimate 1-day effort to consume all readiness content, assuming you are not familiar with the material. These are the recommended readiness links:

* **Must know:**
  + Review the ***Enterprise Modernization Solution Framework*** stored [here](https://microsoft.sharepoint.com/teams/ServicesPortfolio/SitePages/Offer.aspx?OID=780)
* **Should know:**
  + Review the datasheets and overview decks of the Enterprise portfolio which could provide target platform deployment, migration and operations/service management services to the customer at [aka.ms/enmo](https://microsoft.sharepoint.com/teams/servicesportfolio/SitePages/Offer.aspx?OID=780):
* **Optional readiness assets:**
  + Read the whitepaper [Taking the Lead: Gaining a Competitive Advantage through an Optimized Infrastructure](http://download.microsoft.com/download/D/4/5/D45CBC6E-E255-48E9-A303-14C3191AA3ED/taking_the_lead_wp.pdf), which explains Optimization in detail and describes the competitive advantages and business value of Optimization
  + Familiarize yourself with the Light Business Case web based tool. Understand how to input customer data and how to use it.
  1. A Note For Marketing Roles-Marketing Impact Program

HQ Services Marketing and Global Sales have partnered to establish guidance for processes, reporting and accountabilities as part of the Marketing Impact Program (MIP). You can read details [here](https://microsoft.sharepoint.com/teams/WW_Services_Marketing_Impact_Program/_layouts/15/WopiFrame.aspx?sourcedoc=%7B3F88B9EE-C87D-48FF-9581-CB5030000440%7D&file=FY15%20MIP%20Walking%20Deck%20-%20FINAL.pptx&action=default).

* **For Enterprise Modernization, please use the appropriate MIP codes as follows:**

**Enterprise Modernization Strategy Workshop** – Choose from the table below and utilize the Demand Generation (DG) code when delivering the workshop.

|  |  |  |
| --- | --- | --- |
| **Region** | **ECiB Services Activity** | **DG Code** |
| France | HQ: Enterprise Modernization Workshop | 402560448 |
| GCR | HQ: Enterprise Modernization Workshop | 402564537 |
| Germany | HQ: Enterprise Modernization Workshop | 402564173 |
| India | HQ: Enterprise Modernization Workshop | 402568337 |
| Japan | HQ: Enterprise Modernization Workshop | 402560448 |
| LATAM | HQ: Enterprise Modernization Workshop | 402567381 |
| MEAHQ | HQ: Enterprise Modernization Workshop | 402570352 |
| UK | HQ: Enterprise Modernization Workshop | 402560291 |
| US | HQ: Enterprise Modernization Workshop | 402566385 |
| WE | HQ: Enterprise Modernization Workshop | 402567355 |
| APAC | HQ: Enterprise Modernization Workshop | 402566784 |
| CEE | HQ: Enterprise Modernization Workshop | 402567190 |
| Canada | HQ: Enterprise Modernization Workshop | 402556808 |

**Enterprise Modernization Direct Proposal** – Please utilize the Opportunity Optimization (OO) code when sending the direct proposal found in the “Follow-up” folder.

|  |  |  |
| --- | --- | --- |
| **Region** | **ECiB Services Activity** | **OO Code** |
| France | HQ: Enterprise Modernization Direct Proposal | 300187691 |
| GCR | HQ: Enterprise Modernization Direct Proposal | 300189026 |
| Germany | HQ: Enterprise Modernization Direct Proposal | 300188893 |
| India | HQ: Enterprise Modernization Direct Proposal | 300189105 |
| Japan | HQ: Enterprise Modernization Direct Proposal | 300187691 |
| LATAM | HQ: Enterprise Modernization Direct Proposal | 300189230 |
| MEAHQ | HQ: Enterprise Modernization Direct Proposal | 300190087 |
| UK | HQ: Enterprise Modernization Direct Proposal | 300187669 |
| US | HQ: Enterprise Modernization Direct Proposal | 300189173 |
| WE | HQ: Enterprise Modernization Direct Proposal | 300189433 |
| APAC | HQ: Enterprise Modernization Direct Proposal | 300189282 |
| CEE | HQ: Enterprise Modernization Direct Proposal | 300189525 |
| Canada | HQ: Enterprise Modernization Direct Proposal | 300186650 |

1. How to Deliver the Workshop
   1. Workshop Attendance

This is the expected audience during the workshop:

* Microsoft
  + Services Solution/COE architect (leads the workshop)
  + Services SE/SSSP
  + EPG ATS
  + EPG Datacenter SSP
  + Services TAM
* Customer
  + Senior ITDM - CIO/Enterprise Architect/Infra VP is preferred.
  + Enterprise Architect
  + Technical Architect
  + IT Pro leads - people who run operations team, engineering team, etc.
  1. Workshop Activities

The proposed agenda, to be delivered using the ***Datacenter Assessment and Strategy – Day One Workshop Delivery Deck:***

* Why Enterprise Modernization
* The Modernization Opportunity
* Your Organizational Strategy
* Our Approach to Enterprise Modernization

Taking notes

Sections in the deck have pages to use to record notes from the discussion with the customer. You will need to drop out of presentation mode so you can record the notes on the slide. This allows you to get validation from the customer on the discussion point and provides you a record for future discussions.

* + 1. Why Enterprise Modernization

During this section you should be focused on providing an overview:

* + Industry Trends for Modernization
  + Datacenters and their transformation
  + What End of Support means and the risks associated

Focus on getting the customer real core challenges in addition to the review of these topics.

Talking Points

What are some of the challenges that you have experienced in the past for modernizing? Is it just “the way you have been doing it”? Are there silos within the company that affect the overall strategy?

* + 1. The Modernization Opportunity

In this section, you should be focused on the opportunities the customer has to modernize and transform IT do to this compelling event. This section is meant to drive the customer think about if they invested money how would the benefits be realized. These can include:

* To build new applications or websites that require global scale in a snap
* To scale infrastructure at a moment’s notice to meet the most demanding business requirements
* To reduce storage, backup, and recovery costs
* Reduce operational costs: Self-service provisioning, extensive automation and standardization
* Reduce time to deploy new services: Provision individual servers or whole application environments from templates
* Improve efficiency and reliability: Standardized, pooled, high-availability server configurations
* Reduce compliance risks: Segregate admin duties, enforce security and audit policies

Talking Points

How does the customer use technology innovation? What are some of the key technologies that the customer requires to keep their business running? Are they on premise, off-premise? Is their overall strategy to leverage Cloud first and on-premise deployment second?

* + 1. Your Organizational Strategy

In this section, you should be focused on gathering and documenting the key elements to the customer’s strategy and vision. The topics to be discussed during this period are:

* Customer Architectural Vision which includes the standards, principles and constraints that fit their business.
* Defining the business drivers, goals and benefits for enterprise modernization
* Defining the technology drivers, goals and benefits that underpin the business drivers.
* Highlighting the investments and defining how those investments match back to the business and technology drivers and goals.
* Defining the scope of the Architecture. Is this a business unit led initiative or enterprise wide? What is the level of Risk tolerance that the customer has for modernization? Is moving to Azure a viable topic?
* Documenting the Architectural Stakeholders. These could be the key decision makers for IT as well as application group owners.
* Documenting the Architectural Concerns or Risks.
* Documenting the Architectural Decisions made during the workshop
* Documenting the Architectural Options made during the workshop (Cloud First, On-Premise, etc.).
  + 1. Our Approach to Enterprise Modernization

In this section, you will provide an overview of Enterprise Modernization and our approach. The intent of this section is to highlight areas where the customer may want follow on services. For example, if the customer does not know their applications or services then a **Discovery and Rationalization** engagement may be required prior to positioning a **Migration Jumpstart**. The topics to be discussed during this period are:

* Discovery and Rationalization and the associated deliverables as well as the Industrialized Business Case
* Defining the type of Target environments that Microsoft can deploy and the associated services
* Migration phase activities and the Migration Jumpstart.
* Governance and Support
* On-Going Support after the migration
* How Microsoft differentiates from competitors

Talking Points

During this section, it is important to understand how much insight the customer has in their environment to properly position follow on services. In addition, you should uncover how much help the customer will require to perform the migration. This will be key to position the Governance and support role as there could likely be multiple migration factions within a customer (e.g. MCS, Partners, Customer resources).

* + 1. Taking the next step

During this section, you will be discussing the options for Enterprise Modernization and the associated next steps. The ideal next step during this section is to present the customer with a migration jumpstart. This will help show the customer Microsoft’s migration capabilities and also provide a low cost entry point. However, there are some key elements that should be known and discussed with the customer at this point should they want to move forward with the Migration Jumpstart. These are:

* Target Environments – If a customer does not have a migration target, then either MCS, the customer or partner should provide services to
* Defining the type of Target environments that Microsoft can deploy and the associated services
* Migration phase activities and the Migration Jumpstart.
* Governance and Support
* On-Going Support after the migration
* How Microsoft differentiates from competitors

Talking Points

During this section, it is important to understand how much insight the customer has in their environment to properly position follow on services. In addition, you should uncover how much help the customer will require to perform the migration. This will be key to position the Governance and support role as there could likely be multiple migration factions within a customer (e.g. MCS, Partners, Customer resources).

* 1. Post-Workshop Activities

From the completion of the workshop, the following activities should be performed:

* **Enterprise Modernization Strategy Workshop Deck** – The completed deck with the information decided during the workshop should be refined and sent back to the customer through the account team.
* **Follow on Services** – ATS/SSP/TAM/Enterprise Architect/Solution Architect should work together to construct a comprehensive set of services. While the Migration Jumpstart may be the most appropriate next step, some preliminary services such as Discovery and Rationalization or Premier accelerate packages.