citrix | Customer Success

CUSTOMER SUCCESS MANAGEMENT

Success Readiness Checklist

Plan | Build | Rollout | Manage | Optimize

Why success readiness matters

The successful adoption of any new technology can usually be traced back to how well it was planned. For project managers and administrators, that means taking an objective look at your organization's readiness for what's to come—from choosing your project team to rolling out your new solution to end users.

Success readiness is a critical step in the planning process, used to assess how prepared your organization is to implement a new tool or technology. Effective success readiness evaluations create a shared understanding within your organization. They confirm you're solving the right problems and engaging the right teams. And they surface potential risks—before they become impenetrable roadblocks.

A thorough and honest evaluation of your success readiness today will give your new technology every fighting chance of success tomorrow. Leading to a smooth rollout, greater adoption of your new technology, and higher employee satisfaction. It also provides assurance that the technology you've invested in will ultimately address the challenges or business needs you're trying to solve.

By level-setting your strategy and evaluating your success readiness early on, you'll stay ahead of pitfalls and save valuable time and resources down the road. And you'll more seamlessly bridge the gap between your technology and your teams—empowering your people to realize new ways to work.

The Citrix success readiness framework

There are seven key domains to consider when it comes to measuring and tracking your organization's success readiness:

1. **Program Vision & Strategy**
   Establish your goals and success measures, identify key business and solution outcomes, and surface any potential risks or roadblocks

2. **Program Governance**
   Clarify core roles and responsibilities, identify your executive sponsors, and determine a meeting and reporting cadence

3. **Team Management**
   Establish your project or program management team, create a RACI matrix, and address any resourcing gaps or dependencies

4. **End User Readiness & Adoption**
   Engage with end users and business process owners, prepare your people for change, and develop training and reinforcement approaches

5. **Solution Architecture**
   Determine key user group requirements, define your solution architecture and bill of materials, and build a detailed configuration design

6. **Implementation Plan**
   Confirm your infrastructure requirements, assign tasks to your delivery team, and prepare your testing and rollout plans

7. **Operations & Support Plan**
   Define your day-2 admin training model, develop end user and operational support strategies, and create a maintenance plan

It's important to assess each of these seven domains thoroughly to get the most out of your planning initiatives. Proactively evaluating where you are—and where you'd like to go—in each of these areas will help give you a balanced and holistic understanding of your success readiness.

Success readiness checklist

This checklist includes questions and considerations to guide success readiness conversations with your team.

Feel free to fill this worksheet out in its entirety, or simply use these prompts to steer your planning discussions. Your answers should help solidify your strategy, identify resourcing gaps, inform important decision points, and ensure you've taken all the right steps to successfully deploy your new Citrix solution.

Program Vision and Strategy

Engage with executive stakeholders and IT leaders to complete this section

- For executive stakeholders: What are the top 3 key business outcomes driving our investment in this solution?

    For example:

    1. Reduce expenses via reduction in total square footage of office space

    2. Reduce regulatory risk (e.g. HIPPA, PHI, GDPR)

    3. Increase revenue and margins through seamless M&A

- What key performance indicators or business success measures are tied to these business outcomes? How will we track them?

- For IT leaders: What top 3 solution outcomes will help us achieve our business goals?

    For example:

    1. Enable remote access / WFH for 2,000 employees

    2. Deliver business critical applications over CVAD to zero footprint client devices, leveraging two-factor authentication

    3. Enable site aggregation

- What key performance indicators or success measures are tied to these solution outcomes (e.g. NPS, % Latency Improvement, +/- C-Sat)? How will we track them?

- Has a detailed project / program plan (including key activities and outcomes) been developed?

- What timelines and milestones do we need to hit to achieve these outcomes?

- What risks or obstacles could stand in our way of achieving our project / program goals?

- What compelling events are tied to this initiative?

Program Governance
Engage with PMO / project or program management to complete this section

- Who is the executive sponsor of this initiative?

- Have all key stakeholders committed to attending all review and cadence meetings?

- How often will the governance team meet to assess the project's status?

- How often will our executive sponsor meet for a formal business review?

Team Management
Engage with PMO / project or program management to complete this section

- Are we working with a partner? If so, who?

- What solution components and services will our partner be responsible for?

- Is our partner trained, enabled, or certified on our Citrix solution—or will we need additional resources?

- Who are the key stakeholders responsible for deploying the solution?
  - Project / program management (PMO)
  - Implementation
  - End user readiness and adoption
  - Change management
  - End user experience
  - Operations and support

- What other key roles do we need for this project / program? Who will assume those roles? (e.g. Security, Line of Business stakeholders)

- Have all responsibilities been defined and documented? (e.g. RACI, DACI)

- What resourcing gaps might impact our ability to complete this project / program?

End User Readiness and Adoption
Engage with change management stakeholders and PMO / project or program management to complete this section

- Has a task-level readiness and adoption plan been drafted, and owners assigned? Does the plan account for the following workstreams?
  - Stakeholder engagement
    - Leadership
    - Executive sponsors
    - Champion groups
    - End users
  - End user experience
  - Communication planning and execution
  - Training planning and execution
  - Success measures

- How are we engaging stakeholders at all levels of the business before, during, and after rollout?

- How are we engaging end users to ensure the solution meets their needs? Do we have a two-way feedback channel (e.g. interviews, workshops, pulse surveys) in place to gather insights, provide updates, and measure the overall end user experience throughout the project lifecycle?

- Are we strategically timing and delivering communications to all stakeholders before, during, and after rollout to address what they need to know, when they need to know it?

- What is our strategy for training and enabling all stakeholders (end users, managers, IT Support) to be successful in the future state?

- Have we identified success measures and documented mitigation plans in case results fall short of expectations?

Solution Architecture

Engage with IT leaders and internal stakeholder groups to complete this section

- Which target user groups are in scope for this initiative?

- Has a high-level solution architecture been drafted?

- Have all security requirements been identified, documented, and addressed?

- Have all business requirements been identified, documented, and addressed?

- Have all design requirements been identified, documented, and addressed?

- Have we identified the applications that are in scope for this project / program?

- Have all application dependencies been identified?

- Is application rationalization information available?

- Has a low-level detailed configuration design (blueprint) been drafted?

Implementation Plan

Engage with IT leaders and PMO / project or program management to complete this section

- Has a task-level implementation and deployment plan been drafted, and owners assigned? Does the plan account for the following workstreams?

  - Requirements assessment
  - Low-level configuration design
  - Core infrastructure build
  - Application / use case rationalization
  - Application packaging and deployment
  - Infrastructure configuration
  - User acceptance testing (UAT)
  - Pilot rollout
  - Production readiness and rollout

- What's the expected timeline for implementation and deployment?

- Are our implementation timelines realistic, given our objectives?

- Are there any major milestones tied to this initiative that aren't specified in our project / program plan?

- Have all infrastructure requirements and dependencies been accounted for?

- Does our partner and/or service provider understand our timelines and their role in implementation?

Operations and Support Model
Engage with IT leaders and internal stakeholder groups to complete this section

- Have we developed a support design detailing the proposed solution for end user support (Level 1 Help Desk)?

- Have we developed an operations design detailing the proposed solution for operational / administrative support of the environment?

- What level of software technical support and system maintenance will our teams require to meet our desired support and maintenance objectives?

- Based on the operations and support strategies above, what (if any) operational training / enablement is required for our team to successfully take on ownership of the environment?

- Is there an Operational Acceptance Test plan in place? Has knowledge transfer to Frontline / Help Desk been completed?

Next steps

Congratulations! You're well under way to a strategic, well-planned implementation.

If you need guidance or have questions about where to go from here, please reach out to your Citrix Customer Success Manager (CSM) or email CSM@citrix.com.

Also be sure to check out our supporting documentation and materials in the Success Center. There, you'll find even more tools, tips, and resources to help you at every stage of your project.

citrix

Enterprise Sales
North America | 800-424-8749
Worldwide | +1 408-790-8000

Locations
Corporate Headquarters | 851 Cypress Creek Road, Fort Lauderdale, FL 33309, United States
Silicon Valley | 4988 Great America Parkway, Santa Clara, CA 95054, United States