

Four Adoption and Change Management Best Practices for Organizations Migrating from Citrix to VMware

Audience: EUC leaders

Table of contents

1. Articulate the reason for the change and your vision.	3
2. Define your objectives and success KPIs.	4
3. De-risk the project by building a roadmap for the change.	5
4. Assess the impact of change on people and processes.	6
IT admins	6
End users	7
Successfully migrating to Horizon	7

Organizations that replace their existing desktop and application virtualization platform do so for various reasons. Some want to augment their technical feature set, and others want to gain a secure, integrated digital workspace platform that offers flexibility and the advantage of unified endpoint management. Whether your desktop and application virtualization migration is a standalone project or part of a broader initiative, the degree of success relies on an effective technology rollout and a people-centric approach to the change. Regardless of the size, these projects involve various stakeholders and introduce changes in how IT teams and employees work. To learn about successes and challenges when migrating, we researched Citrix to VMware Horizon migrations projects recently completed in a variety of industries across the United States and Europe. We found that successful organizations consistently use four best practices.

1. Articulate the reason for the change and your vision.

Clearly outlining the reason for migrating to VMware Horizon and Workspace ONE enables you to create a shared vision of the project within your organization. Important points are explaining what you are trying to improve and the new opportunities you foresee by implementing the new platform.

For example, a U.S. bank migrated to Horizon to take advantage of the VMware Unified Access Gateway. Their end-state vision was to enable workspace continuity through secure remote work for most of their end users. A large European car manufacturer migrated to Horizon and Workspace ONE as part of a comprehensive digital workspace initiative to implement a modern management approach for mobile devices and PCs and improve IT admin productivity and the end-user experience.

Highlight the benefits for the organization and the stakeholders involved to facilitate alignment among all those impacted by the change, such as the Infrastructure & Operations team and end users, and all stakeholders required to make the change happen, such as application, networking and security leaders.

For a European local authority, the main objective was to modernize IT operations and reduce costs. They communicated their vision by creating a view of the point solutions that they were replacing, including Citrix, to create a consolidated, integrated platform.

2. Define your objectives and success KPIs.

Organizations deploying digital workspace platforms, such as Workspace ONE, have a range of ambitious goals. A survey conducted in April 2022² ranks organizations' expectations for their digital workspace initiatives.

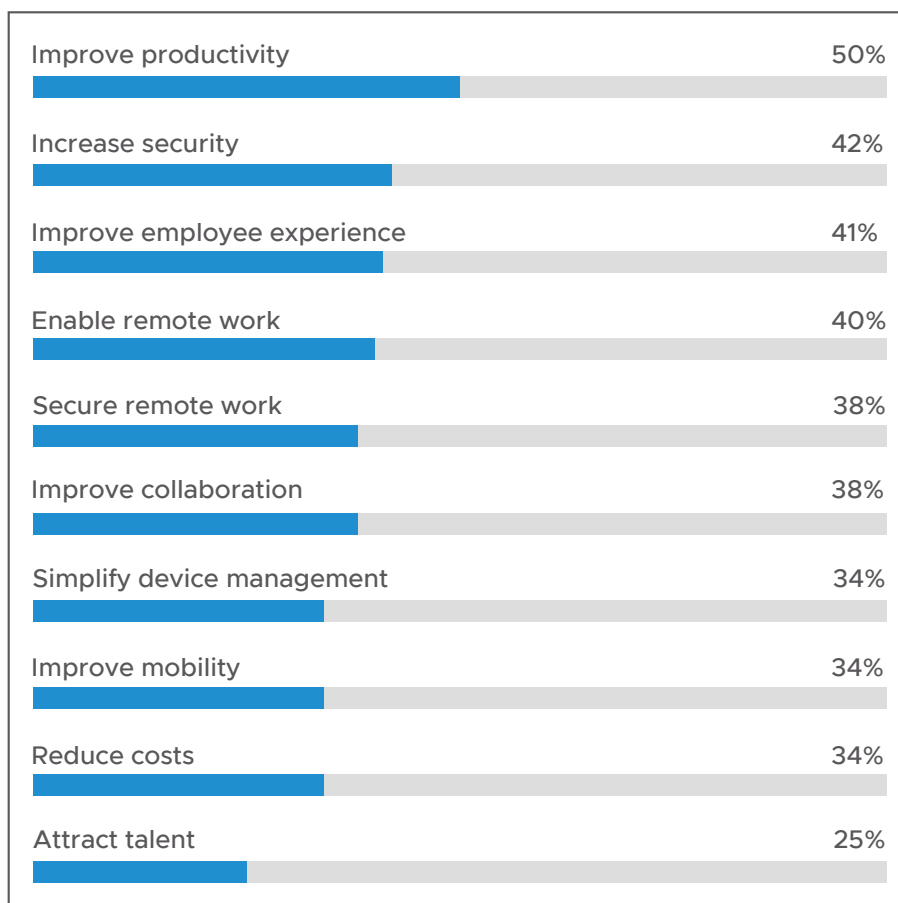


Figure 1: Business and IT leaders turn to [digital workspace solutions to boost performance](#) in a range of critical areas.

Half of the respondents cited deploying digital workspaces to improve productivity as their top goal. Improving the employee experience (41 percent) and enabling remote work (40 percent) were also highly rated. But the benefits of a digital workspace extends beyond the workforce. It also benefits IT and business leaders. That is why improving security—a top priority for both—came in second, named by 42 percent of respondents. Regarding IT department concerns, 34 percent reported simplifying device management as a high priority. And respondents echoed the needs of business leaders in citing reducing costs (34 percent) and attracting talent (25 percent) as goals for digital workspace deployments.

After stakeholders' expectations are clear and the objectives for the project are prioritized, consider creating a dashboard to track the most significant KPIs and milestones. Your KPIs need to reflect the different expectations. For instance:

- Technology adoption KPIs and milestones indicating which technical capability to deploy and by what date
- End-user adoption KPIs to track onboarding, consumption of the new technology, and user enablement advancement
- Employee experience and satisfaction metrics
- IT operations KPIs to measure the progress made in optimizing critical tasks, such as workspace provisioning, application distribution, and image management
- Impact on end-user productivity, tracked through KPIs around the speed of onboarding, login time, workspace performance, and downtime
- Security KPIs, including days to patch, overall security posture, and compliance ratings

For a large U.S. financial services organization, creating and tracking KPIs proved critical in keeping an extensive migration project on track and documenting progress and overall business impact. For a European car manufacturer, KPIs in IT operations and user experience were used as thresholds to evaluate product capabilities that met their business goals.

3. De-risk the project by building a roadmap for the change.

In any migration, but especially when the objective is workspace management modernization, it is essential to mitigate risk by breaking the project into minor changes.

For example, a U.S. state health department built a roadmap of incremental steps to minimize disruption for practitioners and patients. The plan prioritized the deployment of Workspace ONE Access to federate identity management, and then followed it with rolling out the Workspace ONE Intelligent Hub application catalog, where they published applications virtualized with Citrix. This transition was easy for their end users, who reacted positively to the new application hub with single sign-on access. After that successful launch, they built virtual applications and desktops with Horizon and extensively tested the user experience and workspace performance for different user groups. When they reached the desired performance levels, they switched from Citrix to Horizon, one user group at a time. The migration at this point was seamless for the users.

Creating a consumable plan that was shared with IT and business stakeholders and showed how the technology led to the desired outcomes was crucial in almost all the success cases we examined. The project owners, sometimes with the support of VMware or a VMware partner, developed the plan starting from their end-state vision and working their way back to define a prescriptive roadmap for the transition, with stages and milestones.

4. Assess the impact of change on people and processes.

Another best practice that emerged was assessing the impact of the migration on the organization. Such assessments return a clear picture of the resources required to inform and enable those impacted by—and involved in—the change. Use a readiness assessment³ to lay the groundwork for software deployments by revealing what is needed to support the “people” aspect of the project, including communications, training, and documentation, and unveiling potential risks or resistance areas to address.

In the case of a virtual desktop infrastructure migration, two constituencies need to be considered.

IT admins

Although desktop and application virtualization technologies are mature, some differences in approaches, features and processes exist between Citrix and VMware. For example, application lifecycle and image management processes in Horizon do not require changes. Also, Horizon admins can quickly spin up virtual desktops using VMware Instant Clone technology, a unique capability that results from tight integration between Horizon and VMware vSphere®. However, these differences do not prevent an existing Citrix admin team from acquiring the skillset required for the project and becoming well versed in VMware Horizon. A readiness assessment helps identify the level of training and enablement required, and IT admins benefit from having early access to updating their skills. VMware and the partner community can support the IT team with various resources, including guides, feature maps, process change documentation and learning options.

For a European local government organization, early IT admin training was instrumental in upskilling the admin team, winning over their resistance and gaining champions for the project.

For more adoption and change management resources, visit vmware.com/products/workspace-one/end-user-adoption.

End users

For a successful desktop and application virtualization migration, it is imperative to understand end users' requirements and test their experience in their various working scenarios. You can use a readiness assessment to learn about your end users' work styles and, equally important, use monitoring and digital employee experience tools such as Workspace ONE Intelligence. These tools are instrumental for capacity planning and IT infrastructure sizing to balance user performance and cost. They also enable admins to monitor Horizon KPIs that impact employee experience, such as login duration, CPU and memory utilization, disk latency, app performance, and session errors and failures.

As you develop your migration plan, it is essential to avoid disruption to users. A U.S. state health department chose an incremental approach, methodically progressing the Citrix to Horizon migration to new user groups at hospitals and medical centers. This approach allowed the IT team to learn about users' work styles and test their experience under different conditions without disrupting services to patients.

Lastly, prepare a plan to inform employees about the change ahead, explaining why the organization has decided to switch to a different desktop virtualization tool and giving details on how their processes will change and when. To facilitate this work, VMware has created an [End-User Adoption Kit](#) containing a written and designed communication email series, promotional banners, getting started guides and FAQ documents. You can customize these resources with the [Adoption Kit wizard](#) to reflect your organization's branding and company information.

Successfully migrating to Horizon

Successful migration to a digital workspace platform, such as VMware Workspace ONE, including Horizon desktop and application virtualization, involves technical, people and process changes. Strategically planning your migration focuses your processes to positive change management and supports admins and employees through the change. These four best practices can accelerate the value that your desktop and app virtualization migration delivers to IT admins, end users and the organization.

-
1. See [Transforming Windows Application Delivery](#).
 2. MarketScope, conducted by VMware in collaboration with Foundry, surveyed over 560 IT executives across the United States, Europe, and Australia.
 3. For guidance on how to perform a readiness assessment, see the [Adoption Program Guide – Readiness Assessment Section](#).

