



# Client Hardware Refresh Toolkit

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## About this Toolkit

Softchoice developed this Toolkit to help organizations better prepare for their Client Hardware Refresh. In most organizations, this is a major undertaking, and the task becomes even more complex if your offices are spread out across multiple regions.

**Technology users' work behaviors have changed considerably.** Our [research study](#) revealed that 72% of employees now work remotely at least once per month. 62% of employees think they're more productive working outside the office. And 70% of employees would quit their job for more flexible working arrangements somewhere else, including the chance to work from home more often. How people engage with work has changed over the years - employees need different devices, accessories, etc. to stay productive.

**What does all of this mean for IT?** First, you need to re-evaluate your client hardware decisions to better reflect the needs of your workforce. Do your current devices support future transformation?

This Toolkit will help you take the first steps in re-evaluating your end-users' requirements. We also share how Softchoice's IT Department approaches a major client hardware refresh for our 1,300 employees. You'll also learn how to gauge the pulse of your organization, and make your investment decisions pop!

## How Softchoice Approaches a Client Hardware Refresh

With over 1,300 employees spread out across North America, and our IT Department centralized in Toronto, upgrading business devices across the organization is a major undertaking. However, over the years, Softchoice has refined the process, and established a successful approach to each major refresh.

### Our three-step approach!

1. Our IT Manager meets with our preferred vendor at least 12 months in advance of a major refresh, to discuss our road map for the business.
2. We approach a major product refresh in batches. Each year, we upgrade 30% of our client hardware fleet; those units approaching the end of their 3-year warranty with the manufacturer. Dealing with a third of the organization at a time makes it much more manageable.
3. Our IT team sets time aside each year to refresh employee devices. This usually occurs at our annual corporate conference in January. Remote workers fly into Toronto from across North America and our IT Department seizes this opportunity to reclaim old devices and issue new ones. The entire IT Department gets involved, imaging, asset tagging and configuring up to 120 devices at the conference. By doing this, they are able to tackle the refresh process in a timely and efficient manner, reducing the need to ship new devices to remote offices.

## Free Survey Template: Check the Pulse of Your Organization

Each year, our IT department sends out a survey to employees to gain a better understanding what devices would best support them. Feedback from this survey is used to help determine what client hardware devices we invest in.

Below is a template of the survey questions we ask, should you wish to replicate this idea in your organization. We keep it nice and simple by using Survey Monkey, and send it out via email.

### SAMPLE SURVEY

Survey title: **Help choose your next corporate device**

1. What is your job role at [organization]?

|   |                   |
|---|-------------------|
| ▼ | C-level executive |
|   | Sales rep         |
|   | Marketing         |
|   | HR                |
|   | Finance           |
|   | Facilities        |

Other (please specify) :

2. Which features would you value most from your next laptop to perform your job functions? Please rank the below from highest (1) to lowest (5) value.

|   |   |                                  |
|---|---|----------------------------------|
| ▼ | 1 | Long battery life (8+ hours)     |
| ▼ | 2 | Lightweight                      |
| ▼ | 3 | Touch screen capability (tablet) |
| ▼ | 4 | Speed/Performance                |
| ▼ | 5 | New/Modern look                  |

3. Any additional feedback you might have?

**SUBMIT**

## How to Build an End-User Persona

Developing end-user personas is a great exercise to understand the different employees within your organization, what they do day-to-day, how they interact with others, and what their pain points are. From this, you'll be able to better gauge what hardware solutions they need. For example, consider a sales representative often travelling to offsite client meetings. Their technology needs are very different from an accountant working at their desk.

We've developed a handy [User Persona Template](#) and a [User Persona Guide](#) to help get you started. We recommend meeting with various stakeholders in your organization and completing the template together, shadowing them for a while and observing any additional pain points or activities which weren't mentioned in your conversation.

## Seven Best Practices for Your Next Client Hardware Refresh

No matter what your refresh process currently looks like, there are always ways to improve process, management and implementation. Here are seven of the best practices we've seen:

### 1. Start thinking about your refresh 12 months in advance

This includes getting clear on what devices are coming end-of-life or end-of-warranty. Unfortunately, most organizations don't have a systematic way of doing this, often working from a spreadsheets and online research. If this is you, it's definitely worth looking into Softchoice's IT Asset Management services (ITAM). Using the [softchoice.com](#) portal and in consultation with your Softchoice Account Manager, you'll get one clear view of all of the devices and SKUs you have approaching end of warranty, what your expected spend will be to replace them, and what options you have, irrespective of where you have purchased your hardware. It's a total game changer from a budgeting perspective (not to mention for your sanity, too).

### 2. Review your business roadmap frequently

Don't limit this to an annual review! Check in frequently with your business leaders. Have the needs of your business changed? What are end-users asking for, and which devices will support them? In this day and age, the answer is most likely mobile devices, like tablets and 2-in-1s. Check out our survey template in this Toolkit for more advice on how to gauge the pulse of your organization.

### 3. Meet with your vendor or reseller annually or bi-annually

Get together with your vendor or reseller (lunch is on them!) and review their product roadmap for the next 6-18 months. How does it fit with your organization's own roadmap? Are there new products coming down the pipe that interest you, and can you get some demo units once it is released?

#### **4. Play with a demo device**

We all know touching and experiencing a device is an important step in making a decision, but vendors often only have a few demos to go around, so let them know early on that you're interested. Ask your vendor or reseller for some demo units 9-6 months out from your refresh. And don't just play with the demo yourself. Ask a small handful of end-users to test drive them as well. Welcome their honest feedback, listen to how they would work with the device day-to-day, and whether they feel it's the right fit.

#### **5. Set time aside for a client hardware refresh**

A major refresh is a demanding exercise, and not something that can be worked on "in the background." We recommend piggybacking off a large-scale internal event, such as conference, when all employees are gathered together, to update old devices.

#### **6. Standardize on one vendor**

This may sound like an obvious one, but it's surprising how many organizations have not yet done it. This could be for a number of reasons, such as a recent acquisition or change of contract. If this is you, make standardization a priority of your next refresh. There are many advantages to having one vendor, including consistency with running applications, easier troubleshooting, streamlined support, and access to volume discounts and warranty programs.

#### **7. Leverage external support**

Don't have the resources internally to manage a major refresh? Leverage external services to help. Our own IT Lifecycle Services (ITLS) supports every step of the refresh process, from inventory forecasting and budgeting, to procurement, imaging, asset tagging, warehousing, and even device disposal. There's even the option to have this done offsite, so your hardware arrives ready to use. There are many services out there to help - take advantage of them!

# Effective IT Selection and Management for Your End Users

With IT procurement, communication is often the missing piece of the puzzle. End users want one thing, IT recommends another, finance has their eye on the bottom line – no one is on the same page. Once a product has finally been selected, there are complex purchasing vehicles to utilize for maximizing cost saving, POs to track and renewals to sign off on – to say chaos rules is an understatement.

## The path forward

Successful organizations know that in order to ensure the IT products they buy fit the business requirements they have, silos need to be broken down, cross-functional groups need to work together and a streamlined, automated process is the key. IT leaders need to:

### Build a technology roadmap:

To gain a holistic view of their IT needs

### Set technology standards:

Leaving no question unanswered when it comes to what or what not to buy

### Automate workflows:

Make it easy for internal teams to buy the technology they need

### Automate reporting:

To stay ahead of reconciliations and renewals, and reduce manual errors

## How to advance your strategy

Work silos cause real headaches when it comes to IT procurement. It's imperative to break them down. Finance, procurement and IT must all be on the same page to ensure the right tools are purchased, at price-points that make sense. No matter where you are in your procurement journey, a Softchoice dedicated expert will customize a Personalized Procurement Management plan that does it all.

| Our Offering                                   | What we do   | What you'll gain   |
|--|--|--|
| <b>Baseline Assessment</b>                     | <ul style="list-style-type: none"> <li>Map what and how you currently buy, and define alternatives on how you could drive efficiencies and cost savings</li> </ul>           | A solid understanding of gaps in your current process, and a personalized approach to help bridge them.  |
| <b>Build a Technology Roadmap</b>              | <ul style="list-style-type: none"> <li>Experts to navigate vendors, offerings and licensing models</li> <li>Identify your needs and create a map to get you there</li> </ul> | Technology standards to smooth procurement, streamline technical management, mitigate risks and avoid the need to remake decisions.              |
| <b>Personalized Digital Marketplace</b>        | <ul style="list-style-type: none"> <li>Your own custom online marketplace – categorized by use case, or personal need</li> </ul>   | Control over your purchase process. A one-stop shop for the hardware and software you need.  |
| <b>Dedicated, Proactive Account Management</b> | <ul style="list-style-type: none"> <li>Regular proactive reviews, with customized reporting, and renewal calendars</li> </ul>  | The ability to stay ahead of renewals – so you never miss one. Ongoing accurate visibility so there are no more surprises in your renewal cycle. |

Execute with confidence:

**750+**

IT Procurement experts

**27,000+**

active customers

**130,000+**

customized reports

## Softchoice personalizes your procurement strategy

Struggling with procurement? Think of Softchoice as your procurement concierge. From facilitating communication between departments, to streamlining purchasing processes and designing a customized, online technology marketplace, Softchoice simplifies the procurement process. No matter where you are in your procurement journey, our experts are here to help.



### **Data-Driven Insights:**

Thorough assessment of your current environment, with recommendations specific to your desired outcomes.



### **Licensing Selection and Software Asset Management:**

Navigate the complexity of vendor consolidation, licensing and asset management.



### **Technology Mentorship:**

One-on-one, or event-style coaching to develop the skills of your team, and keep up with the pace of innovation.

## Help where you need it

### **Don't know what technology to buy?**

Build a technology roadmap based on end user need and real data – not just technical specifications.

### **Worried about what your employees are buying?**

Book a web demo. Let us show you how to understand what your employees are buying, and why.

### **Missed deadlines because you couldn't get PO approvals on time?**

A personalized portal from Softchoice can help automate workflows and generate visibility across the entire purchase cycle.

### **Still missing renewals?**

A Softchoice Procurement expert helps you set up an automatic renewals calendar. Never miss a renewal again.

## What's Next?

The time to streamline your procurement process is now. Contact your Softchoice Account Manager to schedule an appointment. Let Softchoice help you transform how you select, acquire and manage technology.



Unleashing the potential  
of people & technology

Softchoice is one of the largest IT Solution and Managed Service providers in North America.

Every day, thousands of organizations rely on Softchoice to provide insight and expertise that speeds the adoption of technology, while managing cost and risk. Through our unique points of view, we challenge leaders to think differently about the impact of technology on their employees and customers.