

# Helping Fidelity Investments Upgrade Their Application Deployment Process, for a Windows Desktop and Server Roll Out, in Record Time

Fidelity Investments came to Rich for onsite help with a project that many techs would have considered impossible.

In less than three months, they needed to test and assess application deployment tools for a new desktop and server Operating System, then implement, and create Standard Operating Procedure documentation. And they needed this done not just for Fidelity Investments, but for five of its subsidiaries.

**A project of this magnitude normally takes at least 7-8 months, but Fidelity's revenue goals depended on a quick transition, and they simply couldn't wait.**

## Was It Even Possible? A Herculean Effort.

Given how integral his role would be to the success of the operation, Rich knew he would live and breathe Fidelity's upgrade—often working from early in the morning until 11 p.m. Rich understood that it would take patience, perseverance, and exceptional effort.

Not one to back away from a challenge, Rich rolled up his sleeves and got to work.

## What's so Challenging about an Operating System Upgrade?

You've probably upgraded your Operating System on your home computer countless times, and that's a simple task. Just follow the instructions, click a few buttons, and your computer does the work for you.

**When it comes to companies with thousands of employees?** It's a far more complicated task, and errors could result in major losses to productivity and revenue.

## Understanding Rich's Role (in Layman's Terms)

Fidelity called upon Rich to work on an integral part of their OS upgrade: applications packaging.

**What is application packaging?** In simple terms, application packaging tools are used to successfully deploy, uninstall, upgrade, or repair software applications (e.g., Microsoft Office, Google Chrome) or Windows fixes to a company's computers. It provides the required customization to the settings and features so the user isn't forced to make any additional effort—delivering a seamless, painless experience. All they need to do is launch the application and get to work.

**A Simple Example:** Take a single application, such as the Google Chrome Internet browser. Companies customize Chrome to have their home page open to the company's private intranet site or a Google search page at launch. There are countless customizations that can be performed, restricting or enabling browsing to specific sites, enabling/disabling extensions, etc.

To install applications on an individual employees' desktop or server, companies deploy them from a server—a powerful, centralized computer that stores the applications. Application packaging allows a company to provide a straightforward, automated experience to their employees.

## Seamless application packaging and deployment

Rich led the application packaging team and was laser-focused on providing a seamless experience to the users, employing the following process:

1. **Leverage and escalate packaging issues to the packaging tool vendor for immediate resolution**
2. **Packaging applications and overseeing** for Fidelity Investments and five subsidiaries
3. **Performing Quality Assurance (QA) with all five subsidiaries** to ensure a smooth transition before taking the new OS live

Each step was integral to successfully packaging the roughly 1,500 applications that would reach Fidelity employees across the globe.

## Step 1: Vendor Selection

Rich and his team conducted extensive interviews of five leading vendors that offered application packaging tools at the time. Knowing that everything was on the line, Rich asked the tough questions and ultimately chose a vendor that had both the technology and the dedication to help them succeed. After all, he would find himself working side-by-side with the vendor to troubleshoot any issues and ensure a smooth transition.

## Step 2: Packaging the Applications

The next step was to determine how each subsidiary wanted to customize their applications. To this end, Rich worked one-on-one with each subsidiary's Application Sponsor, reviewing each piece of software, then capturing, documenting and implementing the customizations requested. During this process, Rich was flexible to last minute changes and always delivered exactly what the Application Sponsor requested.

## Step 3: Running Quality Assurance (QA)

Application packaging isn't always a straightforward process, since various applications don't always work well with other applications or the operating system. With this in mind, Rich could not simply roll the applications out to the workforce without testing them to make sure they "played nicely" with each other—a procedure known as integration testing.

Rich and his team took a methodical approach to quality assurance, creating an Integration Testing Lab that included:

- **User acceptance testing** to QA test individual applications
- **Integration testing** to ensure that all the applications worked together

Fidelity is a "locked down" Windows permissions environment, which means it only provides employees access to read/write to their own Windows profile. Many applications require read/write access to the Operating System, so there were many occasions that involved long hours of complex troubleshooting, creativity, innovation, customized scripting, and repeated testing.

Rich rolled up his sleeves, contacted vendors, scoured the internet, and worked late hours to ensure a successful operation.

## Success + Becoming Fidelity's Subject Matter Expert

It's standard procedure, when conducting upgrades of this size, to roll them out in batches/phases to 200-300 computers at a time. This ensures that if problems occur, they don't hit every computer at once and cripple the entire organization.

The upgrade was so successful that Fidelity tapped Rich to become the company's Subject Matter Expert on application packaging. In fact, Rich wrote a manual outlining the new standard operating procedure that he and his team created, which was adopted by other subsidiaries throughout the Fidelity family.

### Teaching the Procedure to a New Tech Team in India

Three years later, Fidelity decided to outsource their tech support to India, and they called upon Rich to train the new teams. Knowing how vital proper application packaging was to Fidelity's success, Rich worked closely with the new staff to make sure they understood every step in this integral process, guaranteeing successful upgrades in the years to come.

## Creating a Lasting Impact

Rich stands out among IT consultants because he takes the time to truly understand each client's vision, goals, and direction.

- How does any given project **fit into your plans** in the years to come?
- Which solutions will have the greatest **impact on your ROI**?
- What can you do to **future-proof** your technology?

Rich thinks long and hard about these questions because his goal is to make a lasting impact on the organizations he serves—just as he did with Fidelity Investments.

## Ready to future-proof your technology?

[Contact Rich Today](#)