ITVORTEX

SIMPLIFY. PROTECT. EVOLVE.

PREMIER BROADCOM VCSP PARTNER / VMWARE-POWERED CLOUD

MODERN WORKPLACE

From Physical Desktops to DaaS.

A five-step playbook for migrating your workforce from physical desktops to managed virtual desktops. No big-bang cutover, no rip-and-replace, no overloaded IT team.

5	90	60%	0
MIGRATION STEPS	DAY TIMELINE	TYPICAL TCO DROP	RIP-AND-REPLACE

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Modern Workplace Playbook / 2026

WHY THIS PLAYBOOK EXISTS

Physical desktops are a tax you've stopped noticing.

Physical endpoints are expensive to procure, painful to secure, slow to scale, and increasingly disconnected from how modern work actually happens. This playbook gives IT leaders a **battle-tested five-step framework** for migrating to managed virtual desktops without big-bang cutover, without rip-and-replace, and without overloading the team you already have.

$1,800
average fully-loaded annual cost per managed physical desktop in mid-market estates.
Industry benchmark, 2024

68%
of successful ransomware attacks enter the environment through an endpoint.
Verizon DBIR, multi-year

10 hrs
IT time spent per endpoint per year on imaging, patching, hardware support, and refresh.
Industry benchmark

How to use this playbook

STEP 01

Walk the five-step framework.

The next page maps the full sequence in one view. Read it end-to-end before getting into details so you understand the dependencies between steps.

STEP 02

Score your readiness.

For each step, ask whether you have the inputs and skills to execute internally, or whether you'd benefit from a partner-led delivery model.

STEP 03

Build the migration plan.

Use the 30-60-90 timeline on page 6 to anchor wave sizing and decision gates. A typical mid-market estate completes the framework inside a single quarter.

STEP 04

Validate against the matrix.

The physical-versus-DaaS decision matrix on page 7 is the document you hand to leadership when they ask why this is worth doing now.

THE FRAMEWORK

Migrate without disruption. Five sequential steps.

Each step builds on the output of the one before it. Skip a step and you inherit the cost downstream. Execute them in order and you arrive at a managed virtual desktop estate without surprising your users or your CFO.

1 Assess
Endpoint inventory, app dependencies, persona mapping, network readiness.

2 Define
User personas, desktop profiles, app delivery matrix, sizing logic.

3 Pilot
15-25 users, two personas, 30-day window, defined success criteria.

4 Migrate
Wave-by-wave rollout, persona by persona, hypercare and rollback paths.

5 Optimize
Decommission legacy, right-size profiles, establish steady-state operations.

Why this sequence works

Most failed desktop modernization projects fail in one of two ways. Either they skip assessment and discover application dependencies during cutover, or they skip the pilot and discover persona fit at scale. The framework forces you to surface those discoveries early, when they cost days instead of weeks, and when rollback is still a normal Tuesday rather than a steering-committee meeting.

The pages that follow give you what to do, what to deliver, how long it should take, and the single most common pitfall at each step.

01 Assess Your Current State

Build a defensible picture of what you have, who uses it, and which dependencies matter before you design the future state.

WHAT YOU DO

- Inventory every endpoint by age, OS, primary user, and physical location.
- Map application dependencies: local installs, line-of-business apps, SaaS, peripheral hardware.
- Identify user personas at a high level (knowledge worker, power user, contractor, shared/kiosk).
- Run a network readiness check: bandwidth at HQ and branches, latency to your DaaS region, last-mile reliability.

DELIVERABLE
Written assessment plus persona matrix

TIME
2 to 3 weeks

PITFALL TO AVOID
Assuming every user is a "knowledge worker." That assumption breaks at scale.

02 Define Personas and Desktop Profiles

Translate the persona matrix into a small catalog of desktop profiles, with explicit sizing and app delivery rules.

WHAT YOU DO

- Build 3 to 5 desktop profiles (typically: standard knowledge worker, power user, contractor pool, shared/kiosk).
- Map each application to a delivery method: built into the image, layered, virtualized, SaaS, or browser-only.
- Define sizing per profile: vCPU, RAM, GPU, profile size, persistent versus non-persistent.
- Document the access path: SSO, MFA, conditional access policy, network egress route.

DELIVERABLE
Profile catalog plus app delivery matrix

TIME
1 to 2 weeks

PITFALL TO AVOID
Designing too many profiles. Each profile is an operational burden forever.

03 Pilot With a Controlled Cohort

Validate your profiles, sizing, and access path against real workloads before the broader rollout begins.

WHAT YOU DO

- Select 15 to 25 pilot users spanning two or three of your defined personas.
- Set explicit success criteria: login time, application launch time, helpdesk volume, and user satisfaction.
- Run for a full 30-day window with weekly stakeholder checkpoints.
- Hold a formal decision gate at day 30: scale, iterate, or pause and redesign.

DELIVERABLE
Pilot report plus go/no-go decision

TIME
30 days

PITFALL TO AVOID
Piloting with IT staff only. They are not representative of your user base.

04 Migrate in Waves

Roll out persona by persona or department by department. Small enough waves that any issue is contained, large enough that momentum is real.

WHAT YOU DO

- Plan waves of 10 to 50 users each, on a 2-week cadence.
- Issue pre-migration training and a one-page user welcome guide before each wave.
- Provide white-glove transition support on day-of for every user.
- Run a 7 to 14 day hypercare period after each wave with elevated helpdesk staffing.

DELIVERABLE
Wave-by-wave migration plan with rollback paths

TIME
60 to 90 days for typical mid-market estates

PITFALL TO AVOID
Trying to cut over everyone at once. Big-bang migrations fail loudly.

05 Decommission and Optimize

The step most teams skip. The one that determines whether you actually realize the savings on your business case.

WHAT YOU DO

- Reclaim physical hardware: resale, donation, or secure disposal with documented chain of custody.
- Retire legacy management infrastructure: imaging servers, RMM agents, on-prem PKI for endpoints.
- Right-size DaaS profiles based on 30 to 60 days of observed usage data.
- Establish steady-state operations: quarterly cost review, capacity planning, profile catalog governance.

DELIVERABLE
Decommission report plus optimization roadmap

TIME
First 30 days intensive, then ongoing

PITFALL TO AVOID
Keeping the old kit "just in case." It quietly erases the savings on your business case.

30-60-90 day timeline

30
DAYS / DISCOVER

Assess and Define

Complete the endpoint inventory, finalize personas, publish the profile catalog, and stand up the pilot environment.

60
DAYS / VALIDATE

Pilot and First Waves

Run the 30-day pilot, pass the go/no-go gate, and migrate the first two production waves with full hypercare.

90
DAYS / OPERATE

Scale and Optimize

Complete the remaining waves, decommission physical estate, right-size profiles, and hand off to steady-state operations.

PHYSICAL VS DAAS

The decision matrix to show leadership.

A side-by-side comparison across the dimensions leadership actually cares about. The right-hand column reflects a well-architected managed DaaS estate, not a generic VDI deployment.

DIMENSION	PHYSICAL DESKTOPS	MANAGED DAAS
Fully-loaded TCO per user / year	$1,200 to $2,500	$400 to $1,200
Time to provision a new user	1 to 3 business days	Under 1 hour
OS patching cadence	Per-device, fragmented, drift-prone	Image-level, near-instant, uniform
Security posture	Endpoint-dependent, data on device	Centralized, data never leaves the data center
Scale up or down	Hardware procurement cycle, 4 to 8 weeks	API call, minutes
Lost or stolen device exposure	Full data loss risk, breach disclosure	No data on device, session ends, done
Contractor and seasonal worker model	Buy or lease hardware, image, ship, recover	Provision profile, revoke on end date
IT staff hours per endpoint / year	8 to 12 hours	1 to 3 hours
Hardware refresh cycle	Every 3 to 5 years, capex spike	None. Thin clients last 7+ years

How to read this. The savings are real, but they only materialize if you actually decommission the physical estate per Step 5. Hybrid environments where physical and virtual coexist indefinitely produce the worst of both worlds.

COMPLIMENTARY / 30 MINUTES

Walk your estate through the framework.

Send us your endpoint count, your top three line-of-business apps, and your rough persona breakdown. We will produce a draft assessment, propose a profile catalog, and put a real number on the 90-day migration plan for your specific environment. No pitch, no obligation.

BOOK A DAAS READINESS REVIEW

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ABOUT IT VORTEX

IT Vortex is a Premier Broadcom VCSP Partner and VMware-powered managed cloud provider serving mid-market and enterprise clients. Our service portfolio spans cloud hosting (IaaS), desktop as a service (DaaS), disaster recovery (DRaaS), backup as a service (BaaS), and security as a service (SECaaS). We architect, build, and operate the infrastructure that runs our customers' most important workloads.

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