## Venn’s Blue Border™ Rollout Planning Guide

Putting a solid plan in place is the best way to ensure a successful rollout of Venn at your organization.

# Rollout Timeline

We recommend planning your rollout in the following phases. The dates in this table will populate when you set S.M.A.R.T. goals for each rollout phase below to provide you a high-level summary.

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| Rollout Phase | Completed By Dates |
| [Phase 1: Introduction](#_vodl9ffzhz7r)  Tell your users about Venn. Focus on why you will use Venn and the benefits to your organization. | introduction complete date |
| [Phase 2: Preparation](#_th7kfmu51by1)  Let users know what to expect. Clarify timelines and expectations. | preparation complete date |
| [Phase 3: Onboarding](#_odve172o8pjc)  Support users as they install and start using Venn. Provide clear instructions and prepare for questions. | onboarding complete date |
| [Phase 4: Adoption](#_1y4zb3fiq5sc)  Make sure that users are working in Blue Border. Monitor usage and enforce your company's policies. | adoption complete date |

# Change Management Planner

Remember that you're not just introducing new software—you’re driving a change in how people work. Use the planner below to set S.M.A.R.T goals for your rollout that leverage change management tactics to effectively motivate the change.

**💡Visit the** [**Venn Rollout Toolkit**](https://help.venn.com/hc/en-us/articles/27904874231451) **for templates and resources to support each phase.**

## Phase 1: Introduction

Tell your users about Venn. Focus on why you will use Venn and the benefits to your organization.

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| **S.M.A.R.T Goal**   |  | | --- | | We will introduce Venn to **target users** by **introduction complete date**. |   *Example: We will introduce Venn to all employees by February 15.*   * *IT will notify managers during the first week of January.* * *IT will do a short presentation about Venn during the January All Hands Meeting.* |

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| Change Management Tactic: Start with Why | | |
| When people know the benefits of a change, they are more likely to embrace it.  Help people understand the purpose and value of the change by clearly communicating why it’s happening.  💡*Don’t assume that these reasons will be obvious to your users (even if they are obvious to you!).* | What are the benefits of ensuring your work data is secure?  *Note the benefits for employees, clients, and the company. Mention audits, regulations, and accreditations that apply to the company.* |  |
| What are the potential risks of not working in a secure environment?  *Cite potential consequences from the company, clients, or regulators. Reference any known examples of data breaches in your industry.* |  |
| Why is Venn the right solution for your organization’s needs?  *Think about why you chose Venn. Do you currently have security gaps that Venn helps you close? Is it superior to your current solution (e.g., VDI)?* |  |

## Phase 2: Preparation

Let users know what to expect. Clarify timelines and expectations.

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| **S.M.A.R.T Goal**   |  | | --- | | We will inform **target users** of our expectations by **preparation complete date**. |   *Example: We will inform all employees of our expectations by February 1.*   * *IT will send out a company-wide email after the January All Hands Meeting.* * *HR will send out an updated Device Policy to be e-signed by the end of January.* |

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| Change Management Tactic: Clarify Expectations | | |
| People will resist the new process if they come across surprises along the way.  Remove barriers to change by spelling out the prerequisites and thinking through the implications.  💡*Don’t assume that these details will work themselves out. Getting IT, Security, and HR aligned from the beginning will ensure success!* | **Device Requirements**  Venn requires [these minimum system and software specs](https://help.venn.com/hc/en-us/articles/22309899300763-System-and-Software-Requirements-for-Venn-s-Blue-Border#h_01J362RYJDYH2S16KZ976Z7JSV).  What additional requirements do you have? What is the policy for users who do not have devices that meet the requirements? |  |
| **Device Policies**  You can choose which of [these Security Compliance Checks](https://help.venn.com/hc/en-us/articles/24734840147099-Device-Policy-Admin-Overview#h_01JA8Y5G2TCRQXG20GBD49TZF1) Venn will complete on users’ devices to work in Blue Border.  Note the checks that are most important to your organization and determine if you need to make any exceptions.  *Consider what will be feasible to implement based on the current state at your organization.*  *Keep in mind that you will also be able to implement “recommended” checks to communicate best practices and give you visibility into the cyber hygiene of devices.* |  |
| **Required Software**  List the software products that users must have based on your company’s security requirements and the products needed for your user workflows. For each product, note potential licensing issues.  *Consider the following:*   * *Will users have business or personal licenses? (For example, can users use personal licenses for Outlook, OneDrive, Google Drive, etc.?)* * *Will users need to upgrade if they have old or unsupported versions of required apps (e.g., Adobe Acrobat 2017 or MS Office 2016)?* * *Who will be responsible for purchasing licenses? If the company, are they budgeted for?* |  |
| **Data Storage**  Venn has the following [file system integrations](https://help.venn.com/hc/en-us/articles/29757898599451) available. Where will users store their work files? |  |

## Phase 3: Onboarding

Support users as they install and start using Venn. Provide clear instructions and prepare for questions.

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| **S.M.A.R.T Goal**   |  | | --- | | We will roll out Venn to **target users** by **onboarding complete date**. |   *Example: We will roll out Venn to all employees by June 1.*   * *IT will send out onboarding instructions to employees in waves:*   + *Wave 1 - G&A (18 users): February 1 – February 14*   + *Wave 2 - Operations (62 users): March 1 – March 15*   + *Wave 3 - All other employees (40 users): March 15 – March 31* * *IT will schedule weekly office hours from February 1 – March 31.* |

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| Change Management Tactic: Make It Easy to Comply | | |
| People are more likely to embrace a new process when the path they are supposed to take is clear, even if it’s not what they’re used to.  Make the change easy by providing clear instructions from the outset.  💡*Don’t assume that users will be able to figure it out on their own. Provide instructions that are clear and explicit!* | Users will be required to install the Venn app on their computers to work in Blue Border.  Note any key points users should keep in mind as they install and start using Venn.   * Is there anything users need to do before they install Venn (e.g., download antivirus software)? * Will users log in via your IdP or with a Venn username and password? How will they receive their login credentials? * What core apps will users need to set up and use in Blue Border? * Where will users store and access work files? |  |

## Phase 4: Adoption

Make sure that users are working in Blue Border. Monitor usage and enforce your company's policies.

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| **S.M.A.R.T Goal**   |  | | --- | | We will ensure that **target users** are working exclusively in Blue Border by **adoption complete date**. |   *Example: We will ensure that all employees are working exclusively in Blue Border by June 1.*   * *IT will distribute Venn onboarding status by department to each department head on April 1.* * *IT will set up “Report-only” Conditional Access in Microsoft on April 15 and notify department heads of all failures over the next 2 weeks.* * *On May 1, IT will notify all employees that they will enforce Conditional Access in Microsoft on June 1.* * *On June 1, IT will enforce Conditional Access in Microsoft.* |

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| Change Management Tactic: Make It Hard Not to Comply | | |
| When the old way is difficult or impractical, people are more likely to embrace the new process.  Create obstacles to old habits to ensure the desired change becomes the default choice.  💡*Don’t try to block all noncompliant behavior. Focus on creating a few strategic obstacles that will nudge users in the right direction!* | In order to discourage users from working outside of Blue Border, you can restrict access to key work applications so that they can only be accessed by Blue Border Private Company Gateway IP Addresses.  Which software products will you consider restricting access to?  **Required Criteria:**   * Users have business licenses * The software allows you to restrict access to specific IP addresses   **Recommended Criteria:**   * The software is used by most or all Venn users * The software is used frequently   [Learn more about restricting access here.](https://help.venn.com/hc/en-us/articles/36908909754011)  *Consider locking down access to your core collaboration suites, such as Microsoft 365 or Google Suite.* |  |