lakeside®

The Future of IT Awaits:

Your Guide to a Proactive IT Practice

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CHAPTER ONE:

Introduction: The End of IT as You Know It

Let's be real — traditional IT support is a mess.

It's reactive, chaotic, and designed to fail spectacularly at the worst possible moment. And if an executive's device goes down, forget about it! That's a drop-everything moment. Not to mention that your team is busy keeping tens of thousands of other employees happy and productive.

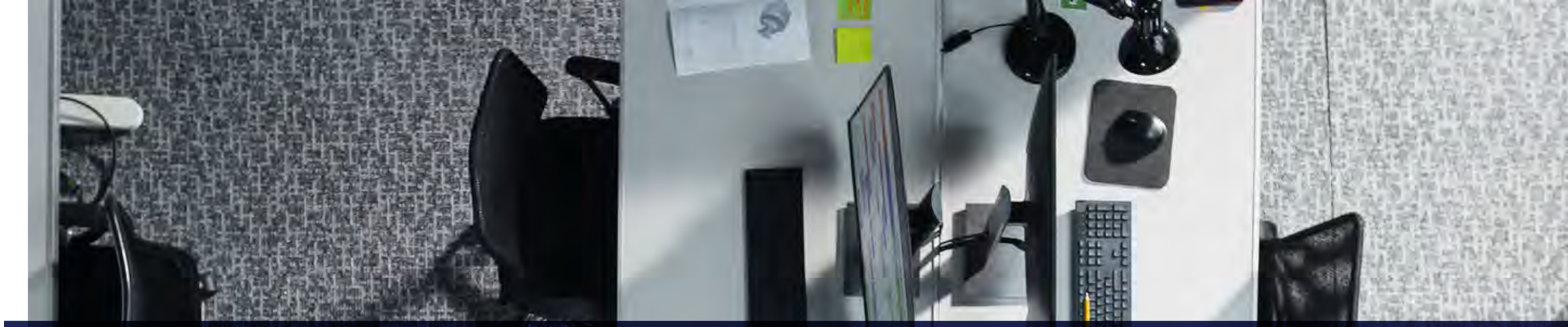
Read Chapter 1

For years, IT teams have been stuck in a cycle of waiting for things to break, scrambling to fix them, and drowning in tickets.

But what if IT could be different? What if you could get ahead of issues before they happen—slashing downtime, cutting costs, making IT the hero, and shining the spotlight on your CIO? That's where Proactive IT comes in.

And best of all? Proactive IT transforms your department from an old-school, reactive service desk into a strategic powerhouse that plays an integral role in enabling the business—especially enterprise companies that are at the forefront of the digital transformation movement.

So, buckle up—we're about to embark on your journey to Proactive IT to improve digital employee experience (DEX).



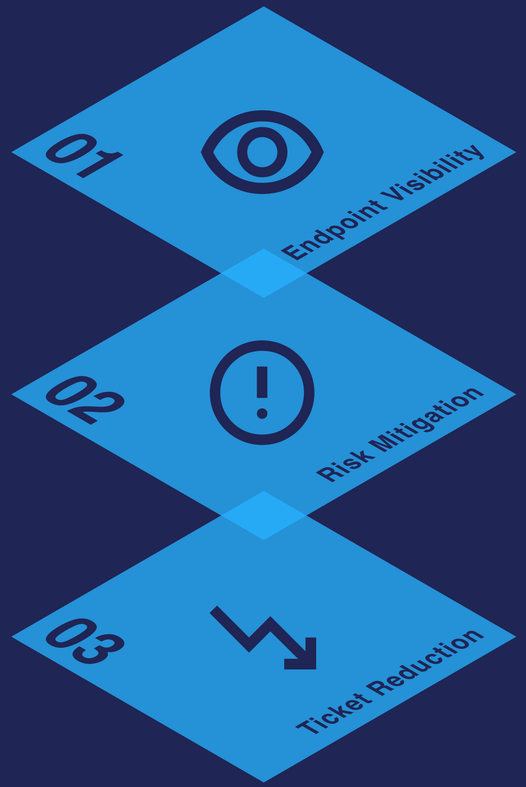
Indeed, it is possible to accelerate your journey to Proactive IT when you can shift from firefighting to foresight. You can jump off that break-fix hamster wheel! A mature Proactive IT practice allows the IT team to:

- Improve device reliability and availability
- Minimize disruptions to unleash productivity
- Optimize infrastructure and IT cost
- Manage complex hybrid environments
- Deliver a superior digital employee experience (DEX)

What is Proactive IT?

Think of Proactive IT as your early warning system. Instead of waiting for end users to submit tickets, a Proactive IT practice allows you monitor, detect, and resolve issues before employees even notice them—well before the issue can have an impact on productivity, business continuity, or (in some cases) the security of your IT estate.

Proactive IT is not just about fewer IT tickets (though that's a major outcome); it's about reducing IT cost, mitigating digital risk, boosting productivity, and ensuring a seamless digital experience for end users throughout your enterprise organization.



PROACTIVE IT IN ACTION INCLUDES ...

Endpoint Visibility:

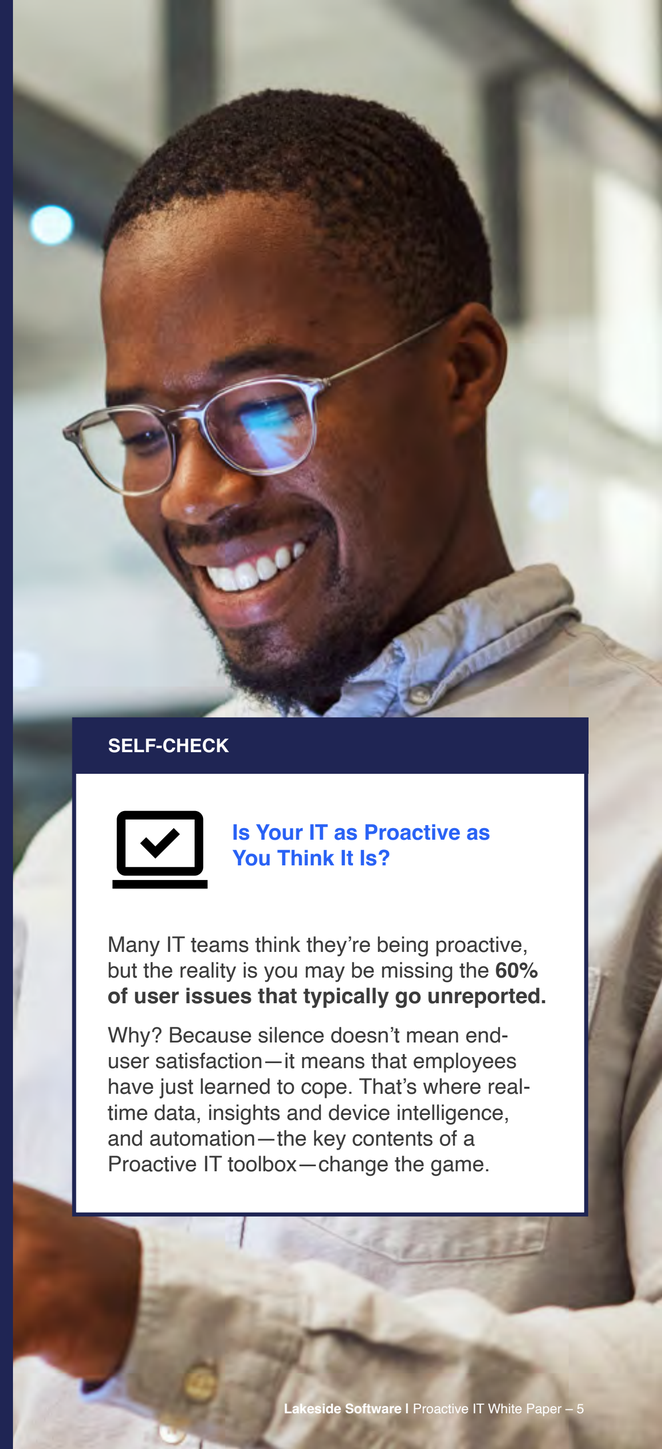
Being able to see endpoint performance and device health lets you identify issues among silent sufferers—those employees who may be experiencing IT issues but never reporting them (or, worse, trying to fix the issue themselves).

Risk Mitigation:

Gaining visibility across the IT estate allows you to detect unpatched software and to ensure endpoint compliance with corporate standards, in turn mitigating risks related to shadow IT and shadow AI.

Ticket Reduction:

Automated fixes for common issues such as sluggish apps mean fewer complaints clogging up the help desk.



SELF-CHECK

Is Your IT as Proactive as You Think It Is?

Many IT teams think they're being proactive, but the reality is you may be missing the **60% of user issues that typically go unreported.**

Why? Because silence doesn't mean end-user satisfaction—it means that employees have just learned to cope. That's where real-time data, insights and device intelligence, and automation—the key contents of a Proactive IT toolbox—change the game.

Financial Services Case Study

By adopting a Proactive IT practice, a U.S.-based financial services organization has fine-tuned its automation strategy using Lakeside SysTrack.

Once it started using automations, the company ran 585,940 a week, ultimately reducing that figure to 144,000 as they addressed the health of their endpoints. Today, by maturing their Proactive IT strategy, this organization uses sensor-based automations that trigger only when issues arise. For example, an automation for a computer configuration refresh prevents 207,000 tickets per month. This Proactive IT outcome ensures end-user devices are properly configured for the company's 35,000 employees, aligning to endpoint compliance with corporate standards and delivering a seamless digital employee experience.

75%
reduction in automations as endpoint health improved

207,000
tickets prevented monthly

35,000
endpoints in compliance thanks to endpoint visibility

CHAPTER TWO:

The Journey to Proactive IT: The First 90 Days

Every great transformation starts with a plan.

Here's how to move from reactive IT chaos to a Proactive IT practice in just three months. You can track your milestones just as you would if you were starting a new job position: by Day 1 onboarding, 30 days in, and 90 days in.

Read Chapter 2

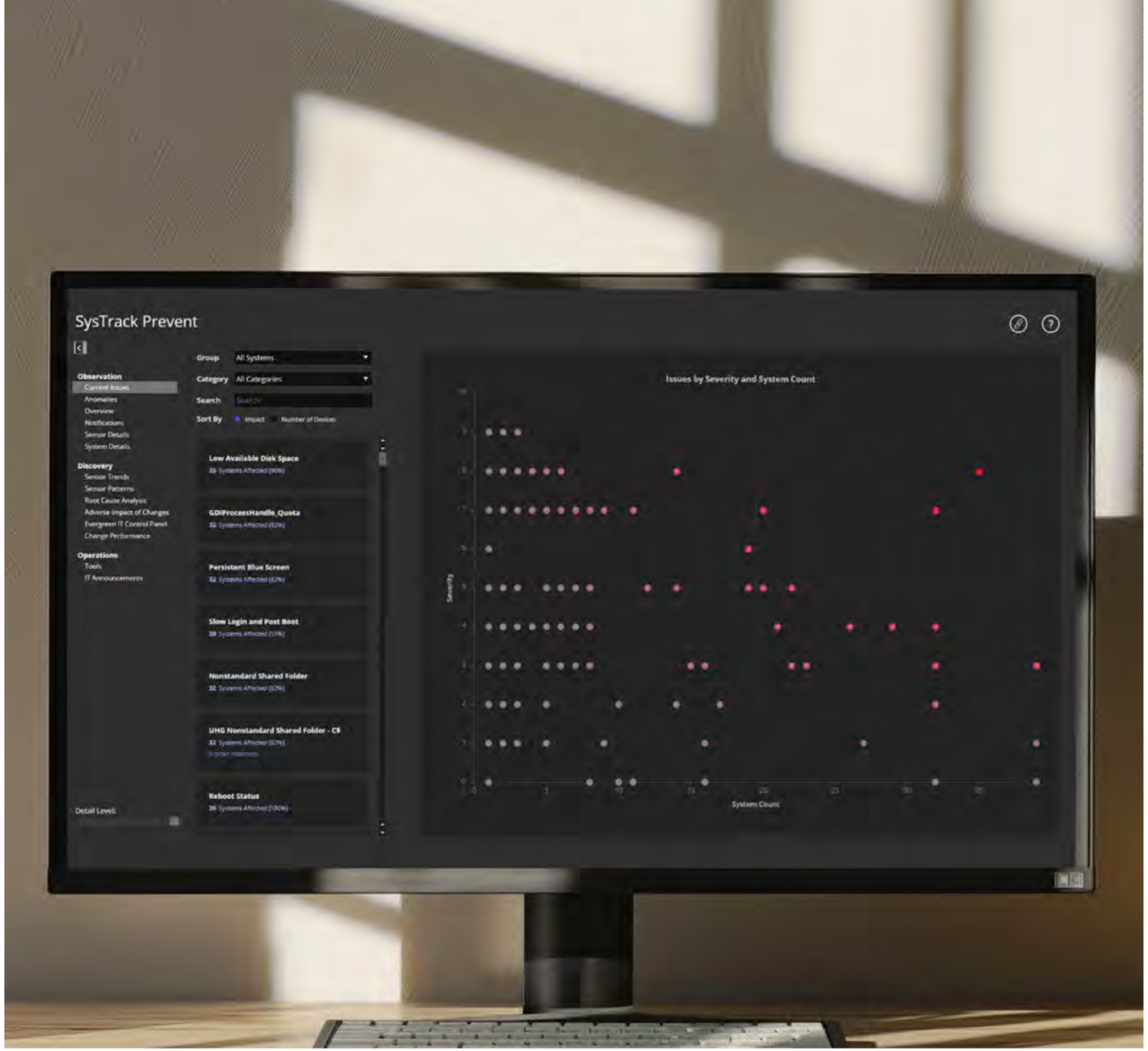
DAY 1:

The Discovery Phase of Proactive IT

Welcome to Proactive IT 101.

Your first order of business on Day 1?
Uncover the hidden issues.

Lakeside SysTrack can turn your reactive IT chaos into Proactive IT calm on day one by surfacing the top issues in your IT estate. Within hours, you'll have a clear picture of the issues that are affecting the most machines—highlighting the most critical to address out of the gate. Imagine logging in on day one and seeing the same problem across hundreds, or even thousands, of machines. Now, instead of waiting for end users to hit device performance roadblocks that prompt them to submit tickets, you can fix the issue with an automation before the employee even notices the brewing problem.



Quick Wins for Day 1:

Uncover Hidden Issues:

Identify the top-priority issues affecting the most end users and start there.

Use Sensor Insights:

Link critical sensors to automations for instant remediation.

Monitor IT Estate Health:

Use your SysTrack dashboard to continuously monitor the health of your IT estate.

DAYS 2-30:

Building Momentum for Your Proactive IT Practice

Having this visibility allows you to quickly address immediate, high-impact issues from day one, while tackling more complex problems as the organization matures its Proactive IT practice over the next month.

Now that you have visibility after implementing SysTrack, it's time to start deflecting tickets before they happen. Because Lakeside SysTrack sets you up for endpoint data collection, you gain the detailed visibility needed to identify and prioritize issues affecting the IT estate and degrading the end-user digital experience.

Having this visibility allows you to quickly address immediate, high-impact issues from day one, while tackling more complex problems as the organization matures its Proactive IT practice over the next month.

By leveraging telemetry data from endpoints and visualizing it through Lakeside SysTrack, IT teams can quickly pinpoint and address issues such as low disk space, poor Wi-Fi signals, or compute power deficiencies in real time. The goal here is to tackle the easy wins—like repetitive L1 issues that often go unreported—by identifying the top 5-10 problems affecting the most users and developing automations to fix the issues before they affect productivity or business continuity. In turn, you can set up automations as needed—either out-of-the-box or customized ones.

Though eliminating all issues in the estate is not realistic within 30 days, focusing on a small percentage of recurring, crucial problems sets the stage for gradual, sustained improvements.

- **Focus on High-Impact Fixes:** Don't try to "boil the ocean." Start with the top 5-10 issues affecting the most users.
- **Automate Smartly:** Test fixes on a subset of systems, validate results, then scale up.
- **Measure and Adjust:** Track the impact of proactive fixes on ticket volume and IT costs.

For example, let's say you discover hundreds of Microsoft Outlook crashes every month due to an outdated plugin. Instead of manually resolving each ticket, set up an automation to detect and remove the bad plugin before Outlook even crashes. Problem solved—at scale.

HEALTHCARE INSURANCE CASE STUDY

A Lakeside SysTrack enterprise customer with 400,000 employees leverages automation to ensure a secure, productive, and frictionless digital experience. Over the course of 30 days, 1.1 million sensor-driven automations addressed system hygiene issues, such as enabling Windows Search to prevent slow search times and ensuring Network Location Awareness for proper Active Directory (AD) functionality. These automations reduce IT tickets and enhance system reliability by enforcing policies at login.

400,000
employees

1.1M
sensor-driven automations

SPOTLIGHT:

Did You Know that Only 13% of IT Issues Cause 80% of Productivity Losses?

IT has long struggled with these major productivity-killers, but now, the technology exists (that is, Lakeside SysTrack) to solve them before they break the business. Prioritizing the 13% of high-impact issues is the key to true Proactive IT.

Research from *The Global IT Experience Benchmark: Full Year 2023 Report* by Happy Signals indicates that 87% of IT tickets are for routine, simple issues such as password resets and clearing browser caches. These L1 and L2 issues can be resolved easily with automation or self-service tools. Most other DEX tools on the market are great at these L1 and L2 issues, but they stop there.

The real impact on productivity, however, comes from the other 13% of tickets—the more complex issues that disrupt employees, their productivity, and the business. Unlike simple fixes, these hard-to-diagnose, high-impact issues require depth, breadth, history, and quality of data to perform root cause analysis, proactive monitoring, and intelligent automation to resolve the problems before they escalate. Only SysTrack offers such robust endpoint data and the resulting actionable device intelligence.

Lakeside SysTrack: Finding & Fixing the Hard Problems

Lakeside SysTrack specializes in tackling these hard-to-detect, high-impact issues by:

- Using machine learning to detect recurring issues by drowning out the noise so teams can prioritize the more crucial ones.
- Leveraging historical data to pinpoint when and why a problem started.
- Enhancing diagnosis and analysis to lead rapidly to more understanding and fixes at scale in a war room situation.

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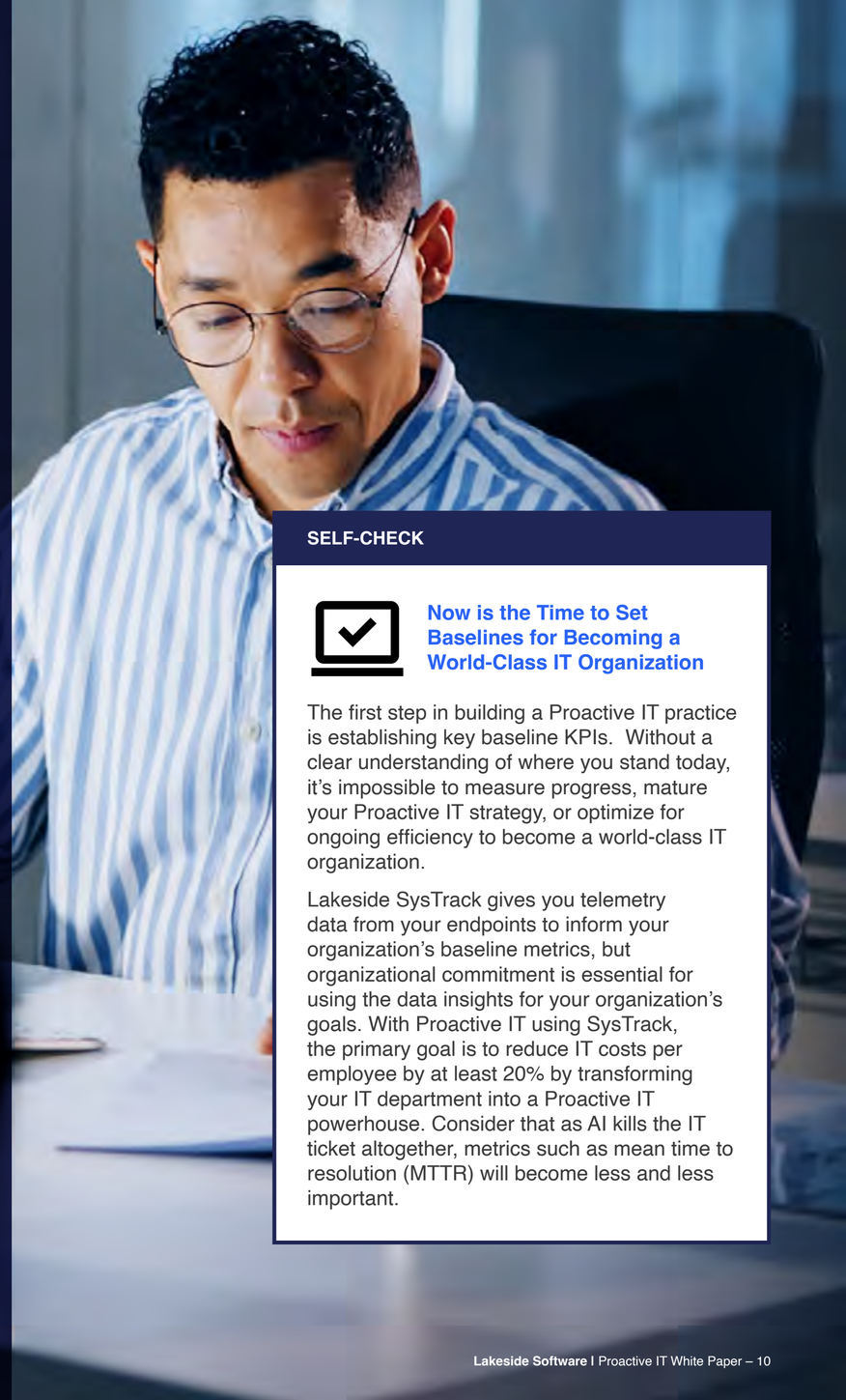
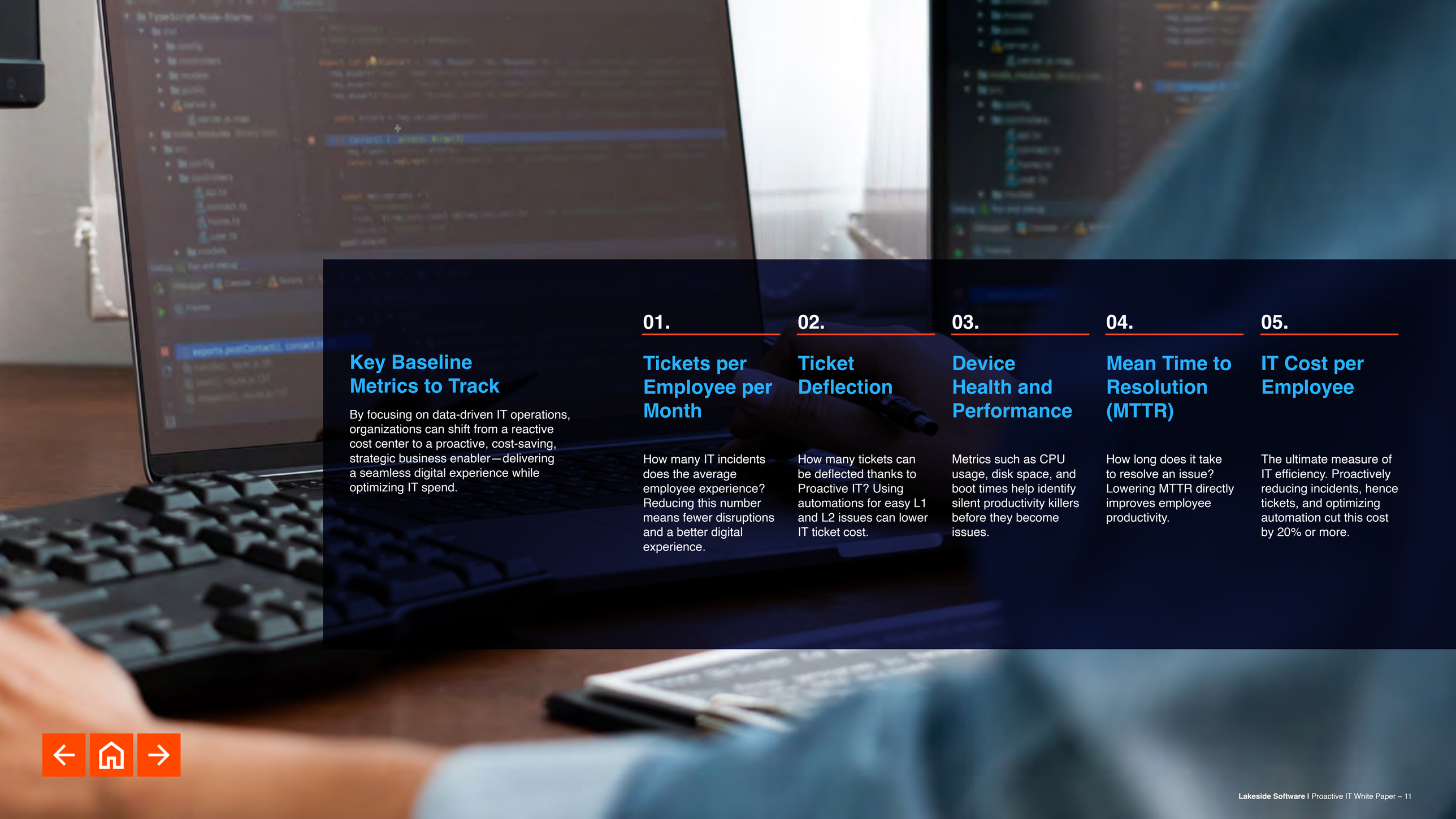


SELF-CHECK

Now is the Time to Set Baselines for Becoming a World-Class IT Organization

The first step in building a Proactive IT practice is establishing key baseline KPIs. Without a clear understanding of where you stand today, it's impossible to measure progress, mature your Proactive IT strategy, or optimize for ongoing efficiency to become a world-class IT organization.

Lakeside SysTrack gives you telemetry data from your endpoints to inform your organization's baseline metrics, but organizational commitment is essential for using the data insights for your organization's goals. With Proactive IT using SysTrack, the primary goal is to reduce IT costs per employee by at least 20% by transforming your IT department into a Proactive IT powerhouse. Consider that as AI kills the IT ticket altogether, metrics such as mean time to resolution (MTTR) will become less and less important.



Key Baseline Metrics to Track

By focusing on data-driven IT operations, organizations can shift from a reactive cost center to a proactive, cost-saving, strategic business enabler—delivering a seamless digital experience while optimizing IT spend.

01.

Tickets per Employee per Month

How many IT incidents does the average employee experience? Reducing this number means fewer disruptions and a better digital experience.

02.

Ticket Deflection

How many tickets can be deflected thanks to Proactive IT? Using automations for easy L1 and L2 issues can lower IT ticket cost.

03.

Device Health and Performance

Metrics such as CPU usage, disk space, and boot times help identify silent productivity killers before they become issues.

04.

Mean Time to Resolution (MTTR)

How long does it take to resolve an issue? Lowering MTTR directly improves employee productivity.

05.

IT Cost per Employee

The ultimate measure of IT efficiency. Proactively reducing incidents, hence tickets, and optimizing automation cut this cost by 20% or more.

DAYS 31-90:

Amplifying the Value of Proactive IT

In this phase of the journey toward Proactive IT, organizations begin to operationalize the value they've gained from the first month of visibility. It is also during this time that newly created automations will have to go through security and legal review before they are deployed at scale, so plan the extended time accordingly.

IT teams also can focus on advancing their proactive capabilities by regularly reviewing sensors to identify new issues and trends. This phase is about turning Proactive IT into second nature, where the insights from the first month are applied across the entire IT estate.

By now, you've laid a solid foundation for Proactive IT and are fully enabled to fine-tune and mature your Proactive IT strategy.

- **Refine Automations:** Not every sensor is useful—turn off noisy ones and tweak triggers for optimal efficiency.
- **Expand Automation Playbooks:** Develop a library of common fixes that IT can deploy on demand.
- **Communicate Wins:** Share success metrics with leadership to showcase the IT team's strategic value.

How Do You Ensure a Safe and Secure Automation Deployment at Scale?

Rolling out automations across thousands of systems can be risky if certain checks and balances are not in place. When deploying automation at scale, the key principle is "trust but verify." Rolling out an automation across thousands of devices requires a structured, tiered approach to ensure security, stability, and a seamless digital employee experience across the IT environment.

This approach mirrors Evergreen IT, using phased deployment rings to ensure stability. Rushing an untested automation to thousands of systems is a critical mistake—every deployment must commit to a thorough validation process.

Bottom line: Automation should never be rolled out blindly. Trust, test, verify...and then scale.

Step 1

Identify the Problem

Which issue needs to be addressed? Visibility across the IT estate is essential to pinpoint problems. Lakeside SysTrack Prevent provides a high-level view of which sensors are being triggered, helping IT teams understand where common and critical issues are occurring.

Step 2

Investigate the Root Cause

Leverage the data, device intelligence, and natural language query (NLQ) tool in SysTrack to perform root cause analysis and streamline on the triggered sensor to determine what is causing the problem before proceeding with automation.

Step 3

Test the Fix on a Small Scale

If no existing automation addresses the issue, develop a targeted fix. Instead of deploying it across the entire environment immediately, first execute the automation on a small test group to validate its effectiveness and avoid potential system-wide disruptions.

- Did the fix work? If yes, expand the deployment to a larger group.
- If not, return to root cause analysis and refine the automation.
- Continue testing in phases, progressively increasing the scale.

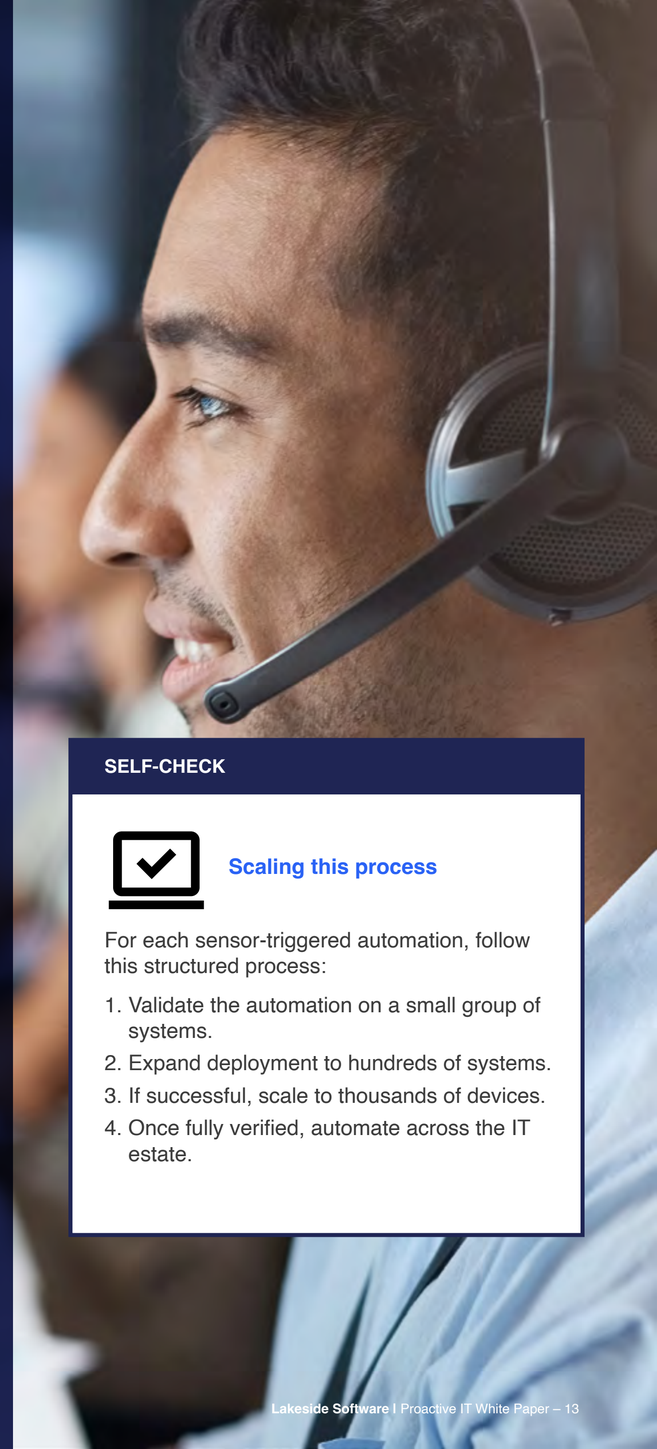
Step 4

Scale the Automated Fix

Once the fix is validated, you can deploy the automation on a broader scale, monitoring for effectiveness, safety, and security. Only then can you fully roll it out enterprise wide.

The key indicators of successful deployment include:

- A downward trend in the detected issue.
- Confirmed resolution across all impacted systems.
- Quantifiable improvements tracked through SysTrack Prevent or SysTrack Resolve.



SELF-CHECK

Scaling this process

For each sensor-triggered automation, follow this structured process:

1. Validate the automation on a small group of systems.
2. Expand deployment to hundreds of systems.
3. If successful, scale to thousands of devices.
4. Once fully verified, automate across the IT estate.

Lakeside SysTrack: Built-in Governance to Boost Confidence in Automation

One of Lakeside SysTrack's unique, standout features is its built-in governance for automation. This protection adds a layer of security, ensuring that no one can introduce rogue applications or manually edit automations without proper oversight. In a traditional manual environment, an IT administrator might upload a script that could be altered or misused. By contrast, SysTrack requires an approval process for any changes made to automation scripts, ensuring that only authorized personnel can modify configurations.

This governance step minimizes risk, prevents potential issues such as accidental system wipes, and ensures that changes are thoroughly vetted before being deployed and rolled out at scale.

Advancing Proactive IT with Hardware and Software Optimization

During this two-month phase, organizations move from baseline assessments to Proactive IT optimization. This is where hardware and software optimization can become a critical factor in proactively improving DEX, ensuring seamless IT operations, and reducing IT cost.

IT teams should begin analyzing and optimizing hardware readiness, hardware sizing based on user personas, software readiness, and software sizing to prevent performance bottlenecks and ensure system efficiency.

Hardware Optimization:

Identify outdated or underperforming devices that may have a negative impact on employee productivity. A Lakeside DEX Pack for hardware rationalization can provide insights into device health, helping IT teams proactively refresh or optimize hardware before failures occur.

Learn more

Software Rationalization:

Assess whether software is running efficiently on existing hardware. Track usage patterns to eliminate unused or redundant applications, getting rid of software bloat, which itself introduces additional digital risk, and ensuring licensing costs are optimized.

Learn more

Setting up Self-Help Options

Toward the end of this phase of the three-month Proactive IT journey, organizations also should focus on reducing IT workload and empowering employees by implementing self-help solutions for common, recurring issues. This phase is key to improving the digital employee experience while lowering support costs and increasing IT efficiency.

By implementing self-help solutions and engagements (e.g., pop-up reminders to reboot the system within a certain time window), IT teams can reduce ticket volumes, improve resolution times, and enhance employee satisfaction, creating a scalable and Proactive IT support model.

STEPS TO SETTING UP SELF-HELP AND ENGAGEMENT TOOLS

01. Identify Common Issues:

Analyze IT support data to pinpoint the most frequent Level 1 and Level 2 issues, such as password resets, printer connectivity, or slow application performance.

02. Implement Self-Help Portals:

Deploy an easy-to-use self-service IT portal that provides employees with step-by-step guides, automated troubleshooting tools, and access to quick fixes.

03. Leverage Self-Healing Automation:

Integrate self-healing automation that allows employees to resolve issues instantly—without contacting the help desk (e.g., an automation that clears the Teams cache when performance slows.) To help you advance this part of the journey, SysTrack features a self-help tray, which is where a user can access SysTrack-driven resolutions.

04. Track Adoption and Success:

Use analytics to monitor self-help adoption rates, issue resolution trends, and the impact on ticket deflection to continuously refine the self-service approach.

SELF-CHECK

Building a Foundation for Long-Term Success

Remember the key milestones you should achieve along your Proactive IT journey:

Day 1: You've uncovered hidden issues.

End of 30 Days: You've identified the top 5-10 issues to address through automation, and you've established baselines using data from existing ITSM tools, endpoint analytics, and user experience monitoring.

End of 90 Days: You've implemented proactive automations and have begun tracking improvements and are ready to transform IT into a strategic business enabler.

CHAPTER THREE:

Maturing Your Proactive IT Practice

Now, IT can have a seat at the strategic table!

As your Proactive IT practice matures, you are set up to become a strategic business enabler instead of just a cost center.

Read Chapter 3

Amplifying the Value of Proactive IT

One of the key use cases for this phase of the journey is digital transformation. All IT organizations are continuously going through the process of digital transformation. This effort culminates in the creation of numerous projects that must be assessed, prioritized, and budgeted for. Large-scale digital transformation initiatives—such as Windows 11 migration or application rollouts—depend on visibility, historical data, and the ability to monitor the impact on DEX throughout the transformation.

The organization will be more effective at digital transformation when they have greater visibility into their endpoint estate. IT leaders also require good, trusted insights based on a breadth and depth of data to help them to make decisions about their IT estate. This robust dataset and the insights it yields help IT save or avoid costs.

Because of the end of Windows 11 support on October 14, 2025, let's take a closer look at what a Windows 11 migration looks like at a mature Proactive IT organization.

WINDOWS 11 MIGRATION USE CASE

Windows 11 Migration Challenge #1:

Gaining Hardware, Application, and User Visibility for Planning

The first obstacle to tackle before any endpoint can be upgraded is assessing which devices are ready, need updates, or are not compatible with Windows 11. Unlike its predecessors, Windows 11 comes with higher hardware and software requirements that could be a showstopper for certain devices. Organizations invested in incompatible devices could face financial implications that hit the bottom line if new parts or devices are required at scale.

Visibility and planning are critical to a Windows 11 migration. Organizations need to assess their estate's hardware for compatibility and identify problem applications. This assessment period should also be used to segment employees by persona groups (i.e., workstyle, role, geography, etc.) to create a phased plan for migration. Some employee groups could be ready to upgrade, while others need extra attention. This allows IT to optimize devices for Microsoft's requirements while right-sizing software licenses for persona needs.

SysTrack Outcomes:

- **Gain insight** into hardware readiness
- **Surface relevant application stability** or performance issues
- **Track performance impacts** on systems, applications, and resource consumption
- **Report migration progress** across the organization

Windows 11 Migration Challenge #2:

Monitoring Health and Performance in Real Time

Moving from planning to execution, migration leaders need to keep a close eye on the reliability of endpoints and overall progress. If issues are missed or left unresolved, they could grow in volume as additional migration phases are rolled out.

Windows 11 Migration Challenge #3:

Ensuring an Excellent Digital Employee Experience

Managing a successful Windows 11 migration requires monitoring across endpoints, applications, and users. Early assessments of hardware and software compatibility and deep, real-time visibility into the performance and experience impact will help organizations deploy Windows 11 without affecting the end-user experience.

Use SysTrack Natural Language Query (NLQ) to Speed Up Your Windows 11 Migration

Extended support contracts are expensive, and security breaches cost even more. Finding all your outdated machines can take months – time you simply don't have. With SysTrack, ask questions about your IT environment in plain, conversational language and get fast, actionable answers.

Determine hardware and application readiness

Identify actions to take to get your machines ready

Assess Windows 11 performance

Monitor the progress of the roll out

SYSTRACK NLQ USE CASE:

Meet Rick. Rick avoided spending $8.7 million by quickly identifying and fixing machines running old versions of Windows, avoiding costly support contracts and reducing breach risks.

Outcomes:

- Quickly identified machines running outdated Windows versions
- Implemented targeted fixes based on SysTrack's recommendations
- Avoided $8.7 million in extended support contracts and potential breach costs

Case Study: An Advanced Proactive IT Practice

One major, U.S.-based insurance provider turned to Lakeside SysTrack to improve their incident management and reduce IT disruptions. Their key performance indicator for success was ticket deflection, specifically focusing on reducing the number of incidents tied to call center employees. This driver was especially critical because of the direct link between digital employee experience and customer experience, which is central to the business. The company's busiest period is during enrollment season, from November to February, when system uptime and stability are essential to supporting a high volume of customer interactions.

KEY RESULTS

35%

reduction in incident tickets

By analyzing Lakeside SysTrack data from their endpoint estate, the insurance provider identified trends and pain points in their incident ticketing system, resulting in a significant 35% reduction in tickets over the course of a year.

AUTOMATION AND PROACTIVE MEASURES

A key part of their strategy was automation, particularly for routine hygiene tasks that could be proactively addressed. SysTrack's data-driven insights helped identify where automation could be most effective. Some examples include:

Reboot Protocols:

The company set protocols for devices that hadn't been rebooted within a certain timeframe, using SysTrack's sensor. When users failed to reboot their systems, automated warnings were sent, giving them a chance to save their work before the system initiated the reboot.

VPN Monitoring:

A proactive outreach was set up to address VPN issues before they impacted users, such as low Wi-Fi signal strength, which affected end-user uptime.

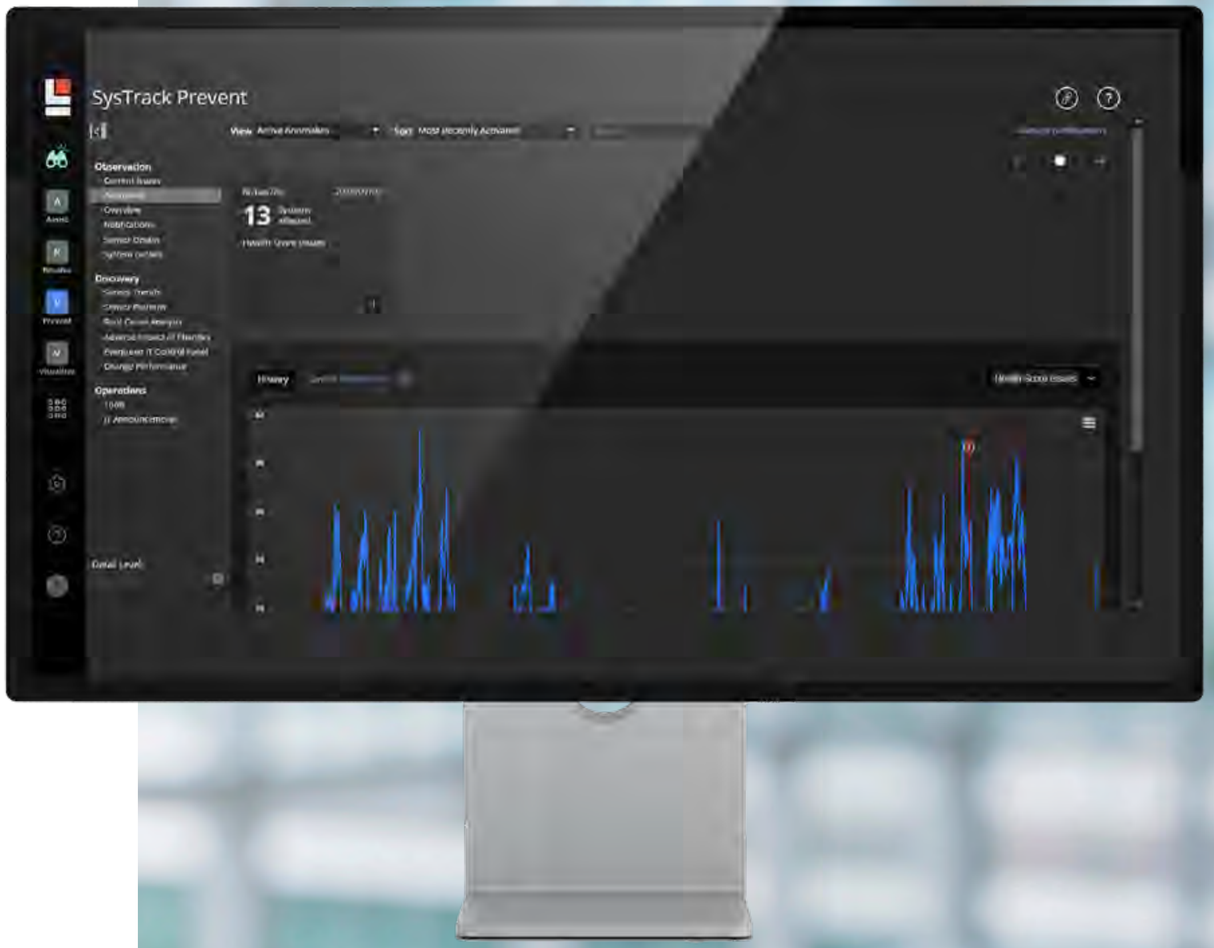
These hygiene automations, along with others, contributed to a significant reduction in incidents—around 30,000 fewer incidents per month across this enterprise company of 400,000 employees.

Looking Ahead to Predictive IT

Using Lakeside SysTrack's embedded AI engine for anomaly detection allows IT teams to proactively identify and address potential issues before they create an outbreak across the user estate, causing massive disruption.

Armed with Lakeside SysTrack anomaly detection, organizations can glean insights from advanced analytics and machine learning to detect unusual patterns across their IT estate. By analyzing real-time telemetry data from endpoints, SysTrack can spot anomalies such as performance degradation, hardware failures, or network disruptions, even before they spread across the IT estate and trigger a cascading influx of service desk tickets. This early detection empowers IT teams to take corrective action proactively, minimizing downtime and improving user experience.

The predictive insights offered by SysTrack help IT leaders optimize resource allocation, prevent outages, and ensure that their infrastructure runs smoothly, all while reducing the time spent on reactive troubleshooting.



SELF-CHECK

Consider Setting Up a Proactive IT Center of Excellence (CoE)

A best-practice approach for the most mature Proactive IT organizations may include creating a Proactive IT Center of Excellence—a cross-functional team that meets regularly to review system anomalies and determine the appropriate response.

Sample Team Composition

- Service Desk Representative – Provides insight into user-reported issues.
- IT Manager – Offers business alignment and strategic prioritization.
- Application Owner – Ensures that application-related issues are addressed efficiently.
- Hardware Specialist – Oversees device health and performance.

Daily Review Process

Each morning, the Proactive IT CoE analyzes abnormal system behavior flagged by sensors and decides:

Should it generate a ticket? If an issue requires investigation, a ticket is logged.

Should it trigger full automation? If a fix is already in place, automation resolves the issue.

Should it require direct engagement? Some issues may need manual intervention before automation is implemented.

Should it be ignored or monitored? Not all anomalies require action—some may be transient or low impact.

CHAPTER FOUR:

Start Your Proactive IT Journey Today with Lakeside

Proactive IT isn't a one-time project—it's a mindset shift.

By harnessing real-time data, automation, and predictive insights, your IT team can eliminate disruptions before they happen, optimize costs, and deliver a seamless digital experience.

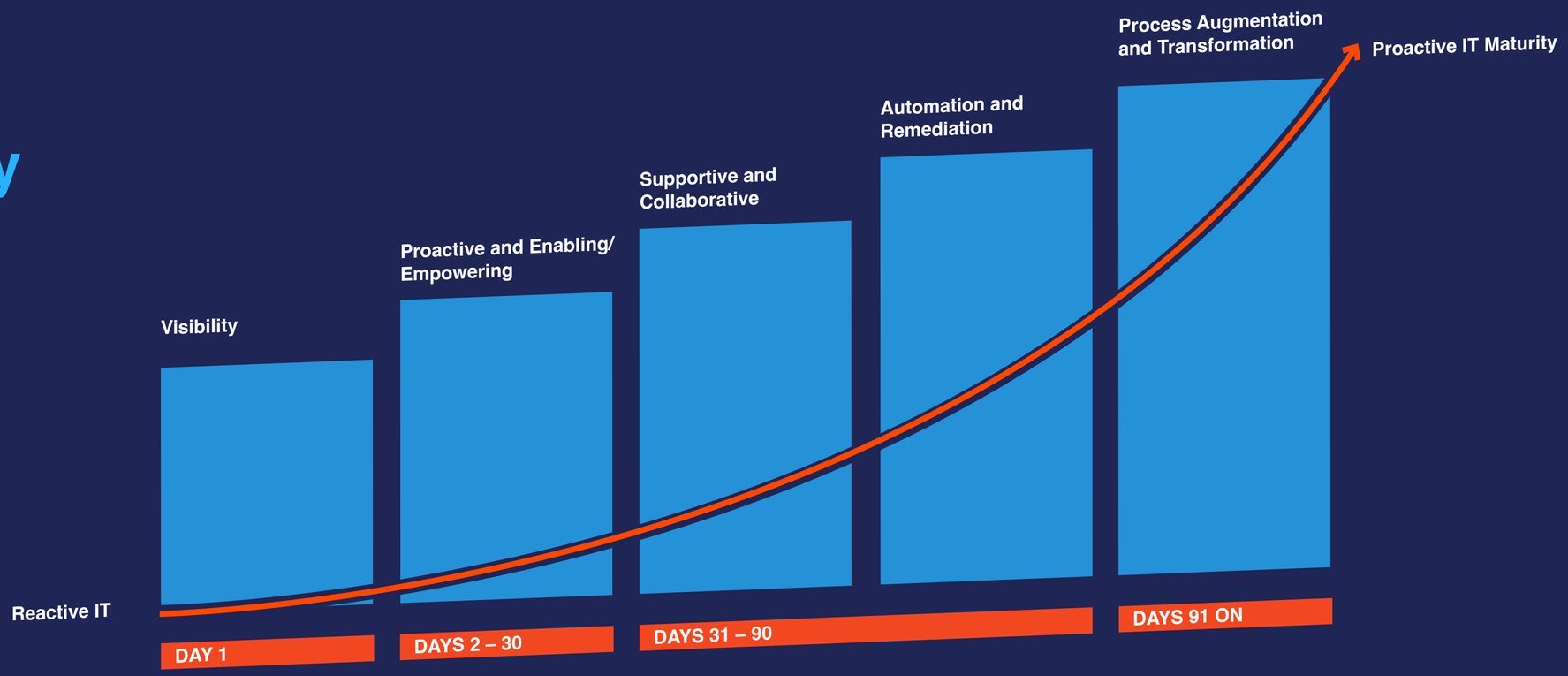
Read Chapter 4

Accelerate Your Proactive IT Journey

Ready to take the leap? Start with visibility, prioritize high-impact fixes, and scale automation responsibly. Before you know it, your IT department won't just be keeping up with business demands—you'll be driving them.

Let's make IT smarter, faster, and proactive — starting today.

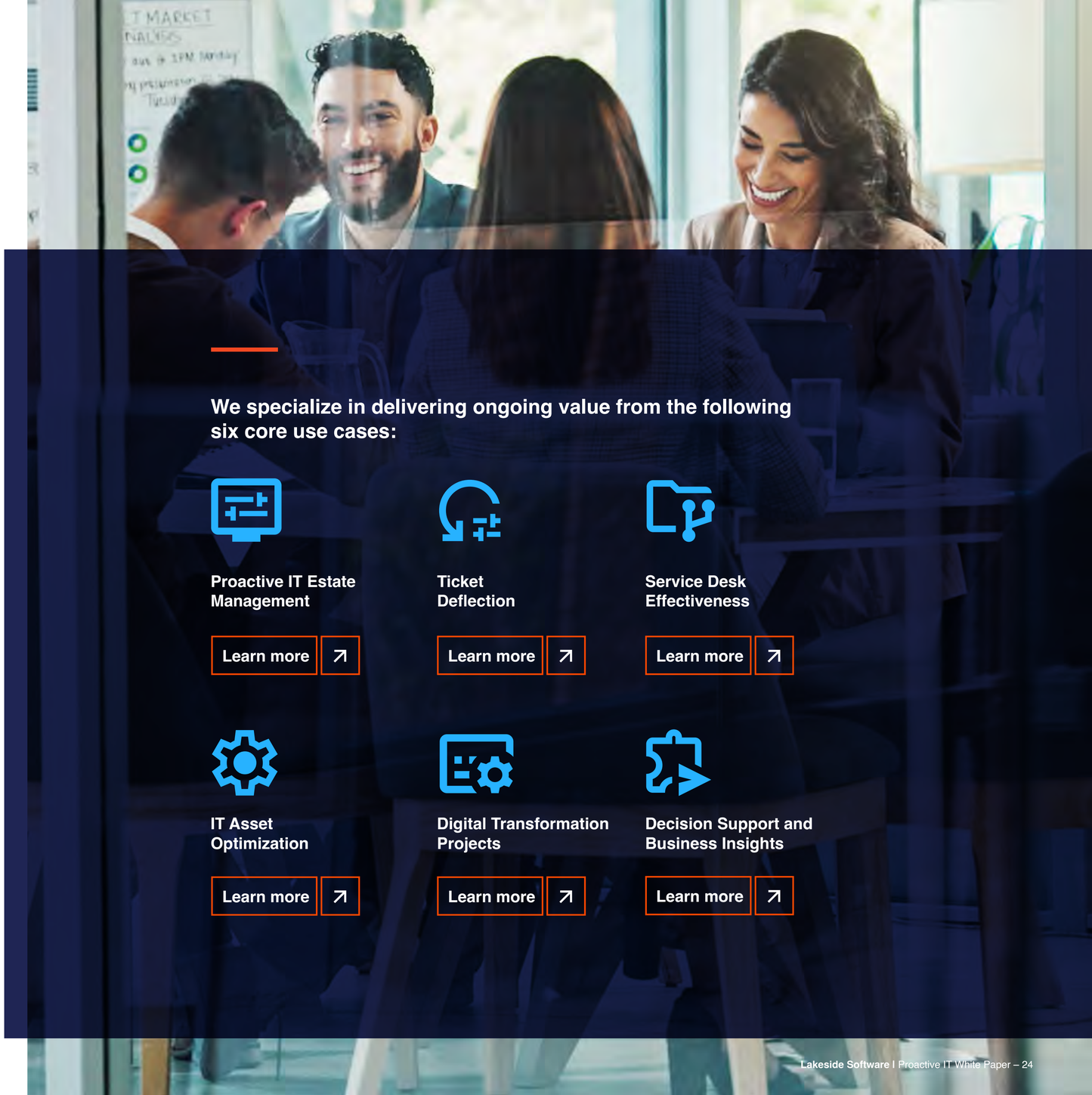
Remember that Proactive IT isn't a tool or a solution. It is an ongoing strategy. Lakeside Software can help you jump off the break-fix hamster wheel and mature your Proactive IT practice.



We’ll Meet You Where You Are

Lakeside Software can help you accelerate your Proactive IT journey—whether you’re just getting started or you’re ready to join the ranks of the most mature Proactive IT organizations across enterprises in healthcare, retail, aviation, financial services, insurance, and more.

Connect with us



We specialize in delivering ongoing value from the following six core use cases:

Proactive IT Estate Management

Learn more

Ticket Deflection

Learn more

Service Desk Effectiveness

Learn more

IT Asset Optimization

Learn more

Digital Transformation Projects

Learn more

Decision Support and Business Insights

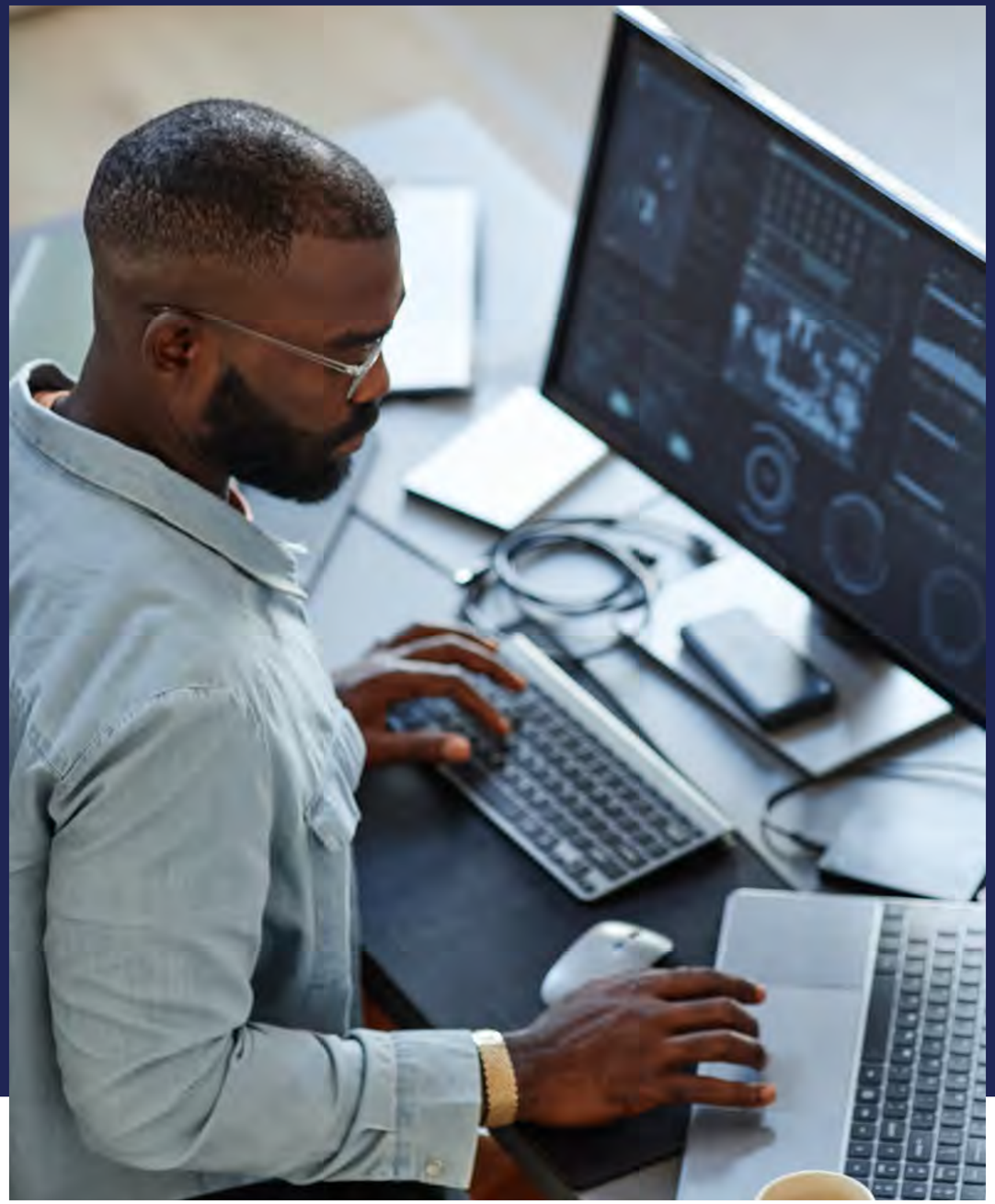
Learn more

About Lakeside

Lakeside Software is ushering in a new era of proactive IT with SysTrack, the industry's most powerful AI-driven Digital Employee Experience (DEX) platform. Trusted by Fortune 500 companies worldwide, Lakeside SysTrack dramatically reduces IT costs, prevents system failures before they occur, and drives strategic decision-making through unparalleled visibility.

Learn how you can save 20% on annual IT costs per employee.

Learn more ↗



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