9 Steps to Successful SharePoint Migration to Office365

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Goal

The goal of this white paper is to prepare you to migrate your SharePoint environment to Office 365. We achieve this through preparation, which includes both a technical approach for moving content, re-factoring custom solutions, addressing incompatible settings, as well as having a clear plan for change management and clear communication. The principles discussed aim to ensure that your preparation includes having a 1) complete understanding of your current environment, 2) a well-developed process for how and when to migrate your content, and 3) an awareness of the possible hurdles you may encounter, as well as how to address them.

Audience

As leader preparing your organization to migrate SharePoint to Office 365, it is important for you to understand that while each migration comes with its own, unique complications the same basic principles of discovery, communication and support are universally correlated with success in any migration.

Understanding where issues may arise and being prepared to address them quickly, maintaining open communications with your user base and providing ample opportunities for training and support will make the journey much more rewarding.

Experience

As part of the Slalom Consulting, Portals and Collaboration practice our expertise has been used by many Fortune 500 companies, including Microsoft itself to migrate SharePoint to Office 365.

Headquartered in Seattle, WA; Slalom is a global consulting firm delivering services associated with design, business and technology. We are over 2,900 professionals across 16 offices in both the United States and Europe. We design and build strategies and systems to help our clients solve their most complex and interesting business challenges.

As a firm, we have migrated more than 1,000,000 users. This includes 3 very large, 150,000+ user migration projects!

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9 Steps to a Successful SharePoint Migration

Step 1: Analyze

During the analysis phase of your project, you will have two outputs; inventory and risk analysis.

It is important to identify all of the content that you are to migrate prior to beginning your migration. While this may seem elementary, you'd be surprised how many companies have more than one SharePoint installation, or test farms that for one reason or another are used for production work...you see where I am going with this…

Begin with a site inventory of all sites collections and sites in your environment. You should be able to identify owners (at least) at the site collection level. Owners will help you identify users whom you will work with through UAT to validate migration process. In addition, the owners will be responsible for helping reinforce communication and may be a required to lean on should you have to work with the business to make tough decisions.

Once you have identified each SharePoint site to be migrated, it is important to have a deeper understanding of these sites by reviewing configuration, size of content databases, assessing customizations and third party tools that may have deployed throughout the live of the site. After performing this analysis, score each site for risk.

Consider this "house cleaning". Just as if you purchased a new home, you wouldn't want to move junk or items that would be donated, you don't want to dedicate effort to migrating sites that are obsolete or that will be deleted upon landing in the new environment.

There are several third party migration tools that can be very helpful with this task. In fact, they can often highlight items which one may normally overlook. It is heavily recommended that an automated tool be used to inventory and provide initial analysis of your SharePoint environment.

Sites with customizations and third party tools add complexity because they will require assessing whether they are supported in Office 365. If they are supported, it is recommended that you create a test site to validate feature parity with what your users will expect after go-live.

Larger, more complex sites can be riskier due to the greater amount of time required to validate content and functionality. It may make sense to account for this by increasing the risk score of these sites.

Also, do not be shy about using the inventory process to enforce some rules around content maintenance, archival and deprecation of obsolete content. Migrating SharePoint content is much like moving. If you've ever hired a moving service, they charge by the pound and you wouldn't want to move items which should be discarded or donated. Migrating content works the same way. There is a cost in terms of time and effort for every MB of content you move. In addition, some third party tools charge by the size of your content database. Your strategy should allow for a period of "house cleaning" where site owners delete content that is no longer needed, or otherwise obsolete.

Once you have completed your risk analysis, the risk score can help you determine which sites may require additional time for validation, user testing, or communication. Prioritize higher risk sites by giving them additional attention to address mission critical business operations, business groups that handle sensitive data, highly customized sites, and other

areas of the business that would have cascading effect on how people get work done should they encounter issues during migration.

Step 2: Plan

The key output from the planning phase is the migration plan. The migration plan is just what you would think it is. These are the step-by-step instructions for how you will move content from source to destination. This includes outlining any steps required prior to migration of content. It should also include details about how you deal with expected issues and outlined avenues of support that you have created for your users. Because you will want to test what you migrate for completeness, you should also outline the process you will use to QA your migration and how you expect users to validate the site from their perspective. Lastly, it should include your schedule for what sites will migrate when.

Most migrations will leverage a third party tool to automate much of the configuration and moving of content. It is important that you thoroughly test and document the steps required. Each use case is different, so testing of the migration process is required to validate items such as the number of version to migrate,

A thorough migration plan also includes details about what content will be migrated when. Most migrations do not occur as a single event, but as successive waves. Waves are groups of sites within the sphere of SharePoint at your company. Waves are generally groups such that groups or departments that interact are moved at the same time to minimize the risk of working in a hybrid state (some content in old environment, some in new) until the migration is complete.

If you have not already decided to do so, at this stage you should consider whether to leverage the Office 365 Migration API to expedite the content migration process. This will require some minor setup and an Azure account, but the benefits gained in speed (up to 30x improvement) will greatly simplify your coordination with business users, incremental migration of content and shorten execution time.

Just as you may have used a third party tool for the analysis of your environment, we recommend using a tool to do the same for the actual migration. Licensing costs will be outweighed by the automation, reporting capabilities that you will gain. Another added benefit is that third party tools will simplify how leveraging the Office 365 Migration API.

Step 3: Preparation

A technology first approach that does not focus on the user first, will fail. Engage with the business and develop a solution to meet their needs; don't deploy solutions for technology's sake. Focus on addressing pain points, minimizing disruptions, and have a rollback and cutover plan.

Your key output from this step is the results of testing of the migration process, refactored custom solutions, and all of the associated details that feed your migration plan.

Take a deep look at your custom solutions to determine whether they require upgrading or refactoring to work as client-side solutions, and don't miss out on the opportunity to re-assess whether an out of the box solution can minimize the number of customizations in your environment.

To account for any changes that will occur to content while you migrate, QA and perform UAT, be sure to also schedule a follow up "incremental" migration to "catch" all of those

changes. While in a perfect environment, you would freeze all content until the end of UAT, this is not feasible for most production systems. So, just as you would "refresh" content when migrating file shares, you will perform an incremental migration to refresh your SharePoint content. A third party tool will also help during this process as it will simplify the task of identifying changes to the content that the human eye may miss.

With a holistic understanding of your current environment, plan to test. Now double your estimates. This is one area you don't want to skimp on.

Step 4: Communicate

Part of a successful migration is communication. The key output of this step will be your communication plan. Your plan should set expectations on pending changes, responsibilities, and timelines. The goal is to provide succinct and efficient communications to appropriate parties at the appropriate time, using the appropriate communication mode. You should:
1. Identify impacted users; you may want to tailor your message by audience (e.g. technical group vs. executives)
2. Identify impact to those users (i.e. let the users know what to expect, how it may look different, known issues)
3. Identify schedule of key events (e.g. include dates and times for when migration is expected to start and end, when systems are back online)

You should be able to document all of the communications your migration will require ahead of time. Focus on a clear message but also timing and identify the target audience. Schedule these in your calendar in advance. Executing on your communication plan should be as simple as clicking send.

If at any point you feel that you are over communicating and want to scale back to keep from flooding users don't. Obviously, you don't want to "cry wolf", but accurate, consistent communication about what to expect and when to expect it helps minimize the risk that the migration effort would surprise users and

Lastly, ensure that your communication plan is not limited to email. Use your existing company intranet to promote the migration, timelines, seek out feedback, and support options. Don't be shy. Your migration may also benefit by using SharePoint itself to communicate migration status via a migration site that is open to all users. Use this as a tool to communicate status provide links to training and support.

Step 5: Train

As part your migration, recognize that the migration could represent substantial change in how your users interact with SharePoint. The key output from this step will be your change management and training plan and associated content.

A change management and training plan should be used to educate users on changes or new functionality, but also as a method to reinforce communication, governance principles and minimize the learning curve for users on the new platform. A successful training plan will increase adoption, help users successfully adapt to change, and realize ROI.

There are the obvious changes in URL, look and feel, new functionality;, but this is especially true if you are leveraging the migration as an opportunity to archive obsolete content, re-architect site structure, re-work navigation, or deploy new features.

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Training can easily be overlooked and a lack of training resources are often cited as a point of failure in migrations that did not succeed. Investments in over communicating and reinforcing training are a great investment and should not be regarded lightly.

Your training plan should account for the fact that users are busy and will require flexibility in how training is made available to them. Yes, in depth, in person training is often the best method for transferring large portions of knowledge to many users at once. However, it is resource intensive, tough to schedule and relies on user availability for retention.

To supplement in-person training, you should leverage other offline methods such as self-paced, videos which can focus on smaller topics, such as "how to" or "quick tips", knowledge base articles can repeat some of the same content as some users learn better through reading than watching videos.

In addition, you should consider developing an informal training program of "lunch and learn" or "brown bags" to introduce new concepts and/or reinforce topics.

Lastly, don't hesitate to also use your communication emails as a training opportunity. While the main focus of your message may be tied to project specifics, dates, or requests for information, don't be shy. Add a "did you know?" or "coming soon" section at the bottom of your messages to highlight new functionality that will make your users more productive or addresses pain points.

Step 6: Migrate

It's go time! All of those weeks, maybe months of preparation have led to this day. Today we move beyond just planning to actually moving content to Office 365! Are you ready?

At this stage of your project, you have a deep understanding of your environment, you have done the necessary house cleaning to archive content and refactored customizations to account for platform limitations of Office 365. You have a plan for what migrates and when, all that you need to do is send communications and "push the button".

Are you sure you are ready?

If you answered, "yes", then proceed as planned. You should be able to notify users and begin. Depending on the amount of content and complexity of your solution, you may be migrating in waves or all at once. **Trust your planning and be prepared to react quickly should you encounter issues.**

If you answered, "no", re-visit your each section of your plan and ensure that you are comfortable with the level of detail outlined to ensure you are ready for any unplanned event. Having a plan when issues arise does not solve your issue, but it gives you a methodology for how you react and will help to keep you cool under pressure.

Step 7: Test, test, test!

Remember when we were planning your migration and we suggested doubling your test time? Aren't you glad you listened? It is important that you look at testing as a two phase approach and it is not all automated.

The first phase is a validation of the migration process. You may review error logs from the migration tool, which may require additional effort to re-migrate some content to fix issues. Some issues, depending on the level of testing you did during preparation, may require manual fixes in the destination. At this time you may also deploy your refactored

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customizations and test their functionality. You want to make sure errors during the migration process are resolved, refactored solutions are deployed, configuration updates made, and that lists/libraries, their content and settings migrated as expected. This QA process normally happens within the migration team, before content is released to end users.

The second phase of the testing process is user acceptance testing (UAT). During UAT, you will want to focus your efforts on the user experience. You will guide the users through UAT by providing a script of what to test, the expected behavior and details on how to report any issues.

In reality, you know exactly what should happen and you want them to report any differences. Does the page render as expected? Is performance as expected? Did the user maintain access to their sites? Is their content where they expected it to be? A successful UAT is your key for gaining sign off to proceed with go-live cutover.

Step 8: Go Live!

Today is the big day! Well, maybe. Some migrations occur in successive waves or by department, so there isn't a "big bang" where we "flip the switch" all at once. A properly coordinated "go live" should address:

- Communication change to users, what will change and when to expect it
- How to address URL changes, re-direction
- Accessibility to legacy environment
- Support mechanism, how to get help and highlight training resources

Whether to migrate all at once or in phases depends on how your business uses SharePoint, support structure, and how business units interact when collaborating in SharePoint. **If you have prepared well, your go live date should be relatively uneventful.**

Step 9: Support

So you've now successfully migrated your SharePoint environment to Office 365. The work is done, right? Not so fast! **While the most technically difficult component of your migration is complete, be careful not to discount the need for support post-migration.** At this stage, there are several scenarios to consider.

The first is the, "Oh…BTW". It is possible, almost inevitable, that there will be some customization or integration that escaped your thorough analysis and in your post-migration glory, an end user will bring up the fact that their custom page or integration with some external system no longer works. In this situation, resolving the issue could be as simple as re-configuring a web part or as complex as re-factoring some custom integration.

Your approach will be the same as with customizations that you were able to identify in your analysis. Understand the solution, then adjust. In many cases, the customization may be addressed by enhanced functionality vs. your prior version of SharePoint. In this situation, do not hesitate at the opportunity to simplify your environment and lower your maintenance costs. In situations where re-factoring code or integration is required, re-visit business requirements for solution to ensure that you focus only on pieces that are still required by the business as some may be obsolete.

The last is the, "Oh yeah, I remember getting an email about that…" Whether it is a user that was not able to or "forgot" to attend training to introduce the platform (remember the

importance of a training plan?), or a user who somehow was completely unaware of the migration at all, it is important to account for the fact that there will inevitably be some users whose responsibilities had them focused on something other than SharePoint (yes, this is possible).

In this case, it is important to remain flexible to provide additional ad hoc, more focused training to ramp them up the learning curve. It is important to leverage self-serve training such as video and wikis to allow them to learn at their own pace and have another avenue for education other than classroom training.

The next is the, "So, now that we've migrated…". It is very likely, that once the dust settles and you are in a steady state, pent up demand for advanced SharePoint functionality will surface. Users may have been putting off requests for new functionality or enhancements in search, or may simply be interested in testing a new feature they heard about.

Setup a site collection dedicated for non-production tinkering, a "sandbox", that allows them to play with Power BI or create custom search pages without affecting your production environment. The concept is not new to developers and now that more and more SharePoint features are focused on empowering end users, it's their turn.

The key with any of these scenarios is to ensure that your team is able to provide timely coverage for any of these scenarios. Build enough buffer into your migration schedule to allow for a few weeks of elevated support to ensure your users adopt Office 365 and reach their maximum potential!

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