

20 STEPS TO A SUCCESSFUL MIGRATION

Cloud technologies have been widely adopted by businesses of every kind in recent years. They are scalable, cost-effective and usually enable organisations to perform better than they would using traditional on-premises datacentres.

For a cloud migration to be successful, it needs to be carefully planned. This includes creating a business case for migrating, considering what the end cloud environment will look like, ensuring business continuity as you migrate, and providing user training once the migration is complete.

Achieve a smooth, successful migration to the cloud with the steps in this cloud migration checklist.

1. IDENTIFY AND ENGAGE STAKEHOLDERS

Engage key people in your organisation, including IT and business stakeholders. Early engagement and getting their support will lead to a smoother migration.

2. CREATE A STRATEGIC PLAN

Identify whether you can perform a Microsoft-based migration (Cut/Over, Hybrid etc.), or whether it's a complex migration requiring specialist tools, e.g., migration from a hosted environment, unsupported on-premises platforms for Hybrid etc.

3. CALCULATE COSTS

Create a business case for your migration, plan costs and estimate the savings that could be made.

4. ENGAGE OUTSIDE HELP

Microsoft partners have a wealth of experience migrating organisations of every size to Office 365, which can save you time and money. Consider using partners for more complex scenarios such as divestitures and mergers etc.

5. REMEDIATE ACTIVE DIRECTORY IDENTITIES AND PREPARE FOR DIRECTORY SYNCHRONISATION

Check that your Active Directory objects conform to the standards required for synchronisation to AzureAD and put into place an action plan to remediate where required.

Ensure that objects are the correct type before migration, for example, check that shared mailboxes are configured as shared mailboxes. You can also plan whether distribution groups should be synchronised or re-created in the cloud as cloud-only groups.

If you have multiple Active Directory domains and are looking to merge them, plan to implement this first. Plan to leave a hybrid Exchange server on-premises if using directory sync for management purpose or replace with an identity management solution.

6. IDENTIFY PROCESSES THAT NEED TO CHANGE

Introducing Office 365 can change a number of business processes around account and group provisioning - ensure that these processes are identified and updated.

7. SECURE OFFICE 365

A secure cloud environment is vital for any organisation. Review the Office 365 security settings that are available to you (this will depend on your licence level) to secure the tenant.

Consider:

- Exchange Online Protection
- SMTP submission lockdown
- Data Loss Prevention
- Conditional Access
- Multifactor Authentication

8. UPDATE INTERNAL POLICIES

Some policies may need to be updated or added to, for example, BYOD policy if personal devices are going to be used or if app containerisation is introduced using InTune. Security policies around Teams and SharePoint Online may also need reviewing.

9. IDENTIFY COMPLIANCE AND RETENTION REQUIREMENTS

You'll need to ensure that any retention settings from on-premises systems are transferred into Office 365 and that policies are configured where required. Nobody has eDiscovery roles by default, so any users that should have access to eDiscovery need to be identified.

10. PLAN FOR SHAREPOINT MIGRATION

Create a plan for migrating file shares to SharePoint. Look at the total size of the data you need to migrate and make sure you have the storage capacity to house it all in SharePoint. Knowing the number of files you are migrating is also important, as it can affect the performance of earlier versions of SharePoint.

You should also identify what the content and data in your file share is. If you have a lot of developer's code, there are better places to store it than SharePoint (and file extensions are not permitted in SharePoint).

You should also identify any files and data you no longer need before migrating them, so you don't use storage unnecessarily. SharePoint has built-in version control to prevent clogging with multiple versions of the same file.

11. PLAN FOR NETWORK READINESS

Plan for DNS changes that need to be made externally and internally to support Office 365. If you're running a proxy server, consider bypassing it for Office 365 traffic (as proxies can add an extra layer of complication and troubleshooting). Plan for firewall updates too, as Microsoft IP ranges are constantly changing. With Office 365, more of your desktop traffic will be passing over your internet links so this needs to be planned for and monitored post 'go live'.

12. ENSURE CLIENT COMPATIBILITY

Ensure clients are running supported versions of client software such as Internet Explorer, Edge and Microsoft Office. Currently, Microsoft support Office 2019, 2016 and 2013 (until October 2020). For 3rd party browsers, Microsoft support the current versions of Safari, Chrome and Firefox. For Microsoft browsers, IE11 and Edge are supported. Older versions of clients may still work, but the experience may be degraded.

13. COMMUNICATE WITH USERS

It's important to communicate with users ahead of and during migration, including telling them about new features and training. Countdown emails in the lead up to the migration are an effective way of preparing users and keeping them up-to-date with the progress of the migration.

14. IDENTIFY CONNECTED SYSTEMS

Most organisations have connected systems that need to be considered, such as an application server relaying alerts or reports that may need to be reconfigured or recoded. Applications need to be identified and confirmed to work with Office 365, e.g., with secure POP or secure IMAP. File date locations need to be identified for any migrations to OneDrive.

15. PROVIDE USER TRAINING

A successful workplace transformation includes training staff so they are familiar with and can use the features and functionality of your new cloud apps.

16. MIGRATE BY DEPARTMENT

To keep the migration simple and straightforward as possible, migrate similar users together, e.g., by department. Plan to migrate shared mailboxes with the batch of users who utilise that mailbox most. Keep batches on the small side; remember, multiple batches can be done per day.

17. RUN A PILOT MIGRATION

Initial migrations can cause disruption for users whilst 'teething problems' are ironed out. Run a pilot migration first with users that have low-complexity workloads and that aren't critical to BAU operations in case of problems.

18. MIGRATE REMAINING USERS

After a successful pilot you can migrate at scale, implementing lessons learned from the pilot migration.

19. DECOMMISSION ON-PREMISES INFRASTRUCTURE

Following a successful migration, you can plan for and perform the decommissioning of on-premises systems. Cost-savings will come when the local infrastructure is decommissioned; you'll reduce your IT overheads and recoup time previously spent managing the infrastructure.

20. LEVERAGE NEW FUNCTIONALITY

Office 365 offers many apps, like Flow and Delve, which can be developed to improve and streamline business processes. Use these to their full potential to get maximum value from migrating.

START YOUR MIGRATION JOURNEY

Get Started with Office 365

Talk to us today about our free Office 365 workshop and get your cloud migration started

Contact Core today | hello@core.co.uk