



BEST PRACTICES FOR A SEAMLESS  
MIGRATION TO SHAREPOINT ONLINE /  
OFFICE 365

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## OUR LEADERSHIP TEAM



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- Digital Business Partner
- Over 18 years of Industry Experience
- Strong background in emerging technologies and leading mission critical programs



**Dimitri Ayrapetov**

- Digital Technology Partner
- Over 15 years of Industry Experience
- Strong background in Digital Technologies
- Co-Founder of the Boston Office 365 User Group

- Headquartered in Boston
- Outcome Based Delivery
- User Experience
- High Quality Solutions
- Team of Full Stack Office 365 & Azure Experts
- Delivered multiple Modern Intranets on SharePoint online and On-premise



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# TrnDigital Migration Services

## Strategy & Roadmap

- Technology Stack Fitment / Which Tool When
- Cloud vs. On-Prem vs. Hybrid
- Change Management Strategy

## Enterprise Offering

- Establish Internal Services Structure
- Define Team Structure for On-going Operations

## Governance

- Planning
- Implementation
- Monitoring

## Information Architecture

- Taxonomy
- Metadata Strategy
- Content Strategy

## Modern Intranets

- Emerging Framework
- Analytics Insights
- Predictive Recommendations
- Mobile First

## Migration Services

- On-Prem to Cloud
- Files Shares to EFSS
- Legacy Platform Modernization

## Change Management

- Communications Planning
- User Adoption Strategy
- Classroom Training and Webinars

## On-Prem Deployments

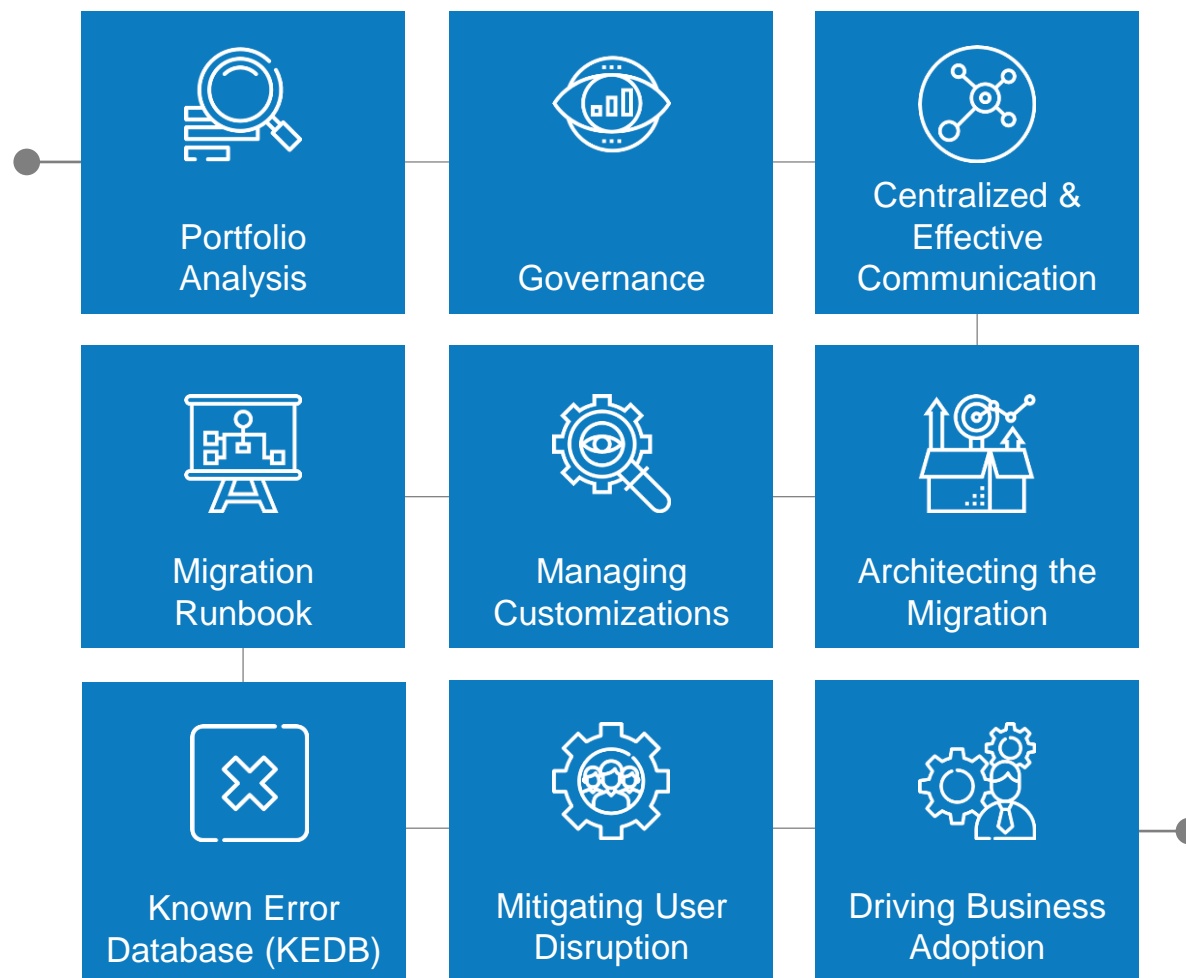
- Capacity Planning & Performance Engineering
- Hybrid Configurations
- Controlled Environments

## DevOps

- Maturity Analysis
- Jump-Start Toolkit
- Process Engineering



# KEY FACTORS FOR SUCCESSFUL MIGRATION







## PORTFOLIO ANALYSIS



Portfolio  
Analysis

Governance

Centralized &  
Effective  
CommunicationArchitecting  
the MigrationManaging  
CustomizationsMigration  
RunbookKnown Error  
Database (KEDB)Mitigating User  
DisruptionDriving Business  
Adoption


# PORTFOLIO ANALYSIS

Your goal is to understand every detail of your environment





# PORTFOLIO ANALYSIS

	Portfolio Analysis
	Governance
	Centralized & Effective Communication
	Architecting the Migration
	Managing Customizations
	Migration Runbook
	Known Error Database (KEDB)
	Mitigating User Disruption
	Driving Business Adoption



## Infrastructure

- Physical and logical SharePoint farm architecture
- Networking considerations
- High availability & DR considerations
- Platform capacity
- Identity management (internal & external)



## Customizations

- Business applications
- Custom components
  - *Commercial off the shelf (COTS)*
  - *Open source*
  - *Built in-house*
- Branding
- Internal and external dependencies



## Content

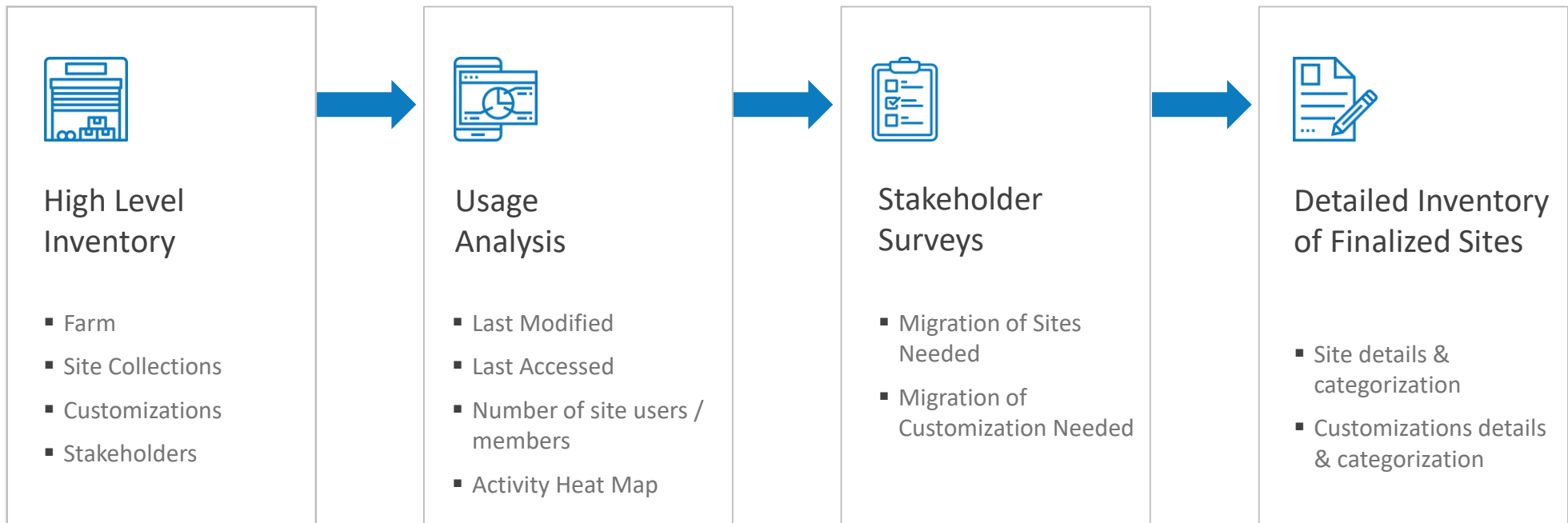
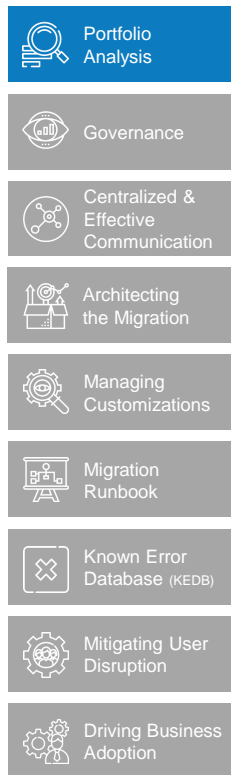
- Structure
- Ownership
- Records management
- Last modified & accessed
- Size & complexity
- Regulated content



## Stakeholders

- Business owners
- Site owners
- Geographical locations
- Time zones
- Languages

# PORTFOLIO ANALYSIS



# CONTENT COMPLEXITY SCORE

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Site template



Site size



Subsite depth



Number of alerts



Number of checked out files



Number of custom features



Number of email enabled lists



Number of InfoPath forms



Number of item versions



Number of large lists



Number of long paths, illegal file name characters, and prohibited file types










Number of workflows

...



# CUSTOMIZATION COMPLEXITY SCORE

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Sandbox Solutions



Full Trust Code



Provider Hosted Applications



SharePoint Hosted Applications



In-line JavaScript



Custom pages



Custom branding



Third party components  
(e.g. Bamboo, K2, Nintex, etc.)



CodePlex / GitHub / Open Source



Integration with other platforms & systems



Availability of source code



Code review focused on APIs leveraged and ease of portability





GOVERNANCE





# GOVERNANCE

- Portfolio Analysis
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- Centralized & Effective Communication
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# ASSEMBLE THE RIGHT TEAM(s)

- Portfolio Analysis
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## Small Companies

SharePoint Governance Committee



## Medium Companies

SharePoint Steering Committee (VP/CxO)

SharePoint Governance Committee



## Large Companies

Steering Committee (VP/CxO)

Infrastructure Governance Committee (Identity, Exchange, Skype)

Application Governance Committee (SharePoint, Yammer, Teams, etc.)

# DETERMINE GOALS & OBJECTIVES

- Portfolio Analysis
- Governance
- Centralized & Effective Communication
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## Platform Governance

- Global Settings
- Shared Services
- Identity Management
- Hybrid Configuration



## Information Management

- Information Architecture
- Information Access
- Taxonomy
- Retention & Compliance



## Custom Solutions

- Customization Policy
- Architecture Standards
- Vendor Integration
- Application Lifecycle Management

# CLASSIFY AND PRIORITIZE GOALS & OBJECTIVES

- Portfolio Analysis
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Show Stoppers



Must Have Day  
1



Must Have Day  
...n

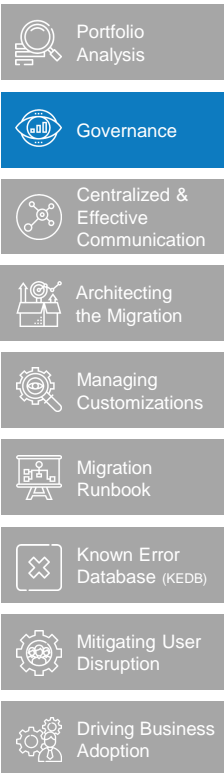


Nice to Have  
Day 1



Nice to Have  
Day ...n

# DETERMINE PROCESSES TO MEET GOALS & OBJECTIVES



What are the business processes required to meet the goals & objectives?

- *E.g. Provisioning a team site requires manager's approval & dept. cost center*
- *E.g. Mandatory metadata fields require a comprehensive Taxonomy*



What are the technology processes required to meet the goals & objectives?

- *E.g. Workflow to gather manager's approval and look up dept. cost center in HR system*
- *E.g. How to we enable taxonomy curators to manage options and control scope of taxonomy?*





# EVALUATE OUT-OF-THE-BOX & DEFINE THE GAPS



What controls are already in place that can be configured?



Are the controls robust enough to meet your goals & objectives?



Is there anything on the O365 roadmap that will fulfill your goals & objectives in the near future? (<https://products.office.com/en-us/business/office-365-roadmap>)



## BUILD A ROADMAP TO FILL THE GAPS



Build a roadmap to fill the gaps based on criticalness, priorities, and cost, plan the next 3-24 months:



### Evaluate options

- *Free online add-ins and scripts*
- *3rd party commercial products*
- *Build your own*



### Map cost of options against goals & objectives

- *Don't forget to include the time required as part of the cost*



Not all policies have to be enforced on Day 1



Not all policies will have things that could be enforced on Day 1

- e.g. enforcing a 1yr shelf-life for all team sites



# CENTRALIZED & EFFECTIVE COMMUNICATION



## CENTRALIZED & EFFECTIVE COMMUNICATION



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Governance



Centralized &  
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Architecting  
the Migration



Managing  
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Migration  
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Known Error  
Database (KEDB)



Mitigating User  
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Build an internal marketing campaign



Build your target lists (customizations, owners, large lists, etc.)



Determine channels (posters, emails, blog posts, lunch session, beer & wine sessions, webinars, etc.)



Know your audience and cater appropriate messages



Be transparent with site owners – don't leave your audience in the dark



Single place to post and aggregate all information relevant for the migration project (end users, site owners, migration team, etc.)



Survey system in place for asking for feedback (e.g. black out dates) and whether sites are needed, etc.



# ARCHITECTING THE MIGRATION





# ARCHITECTING THE MIGRATION



## Design & Build the New House

- Information Architecture
- Governance Policies
- Identity Management
- Workspace Provisioning Mechanisms
- Branding

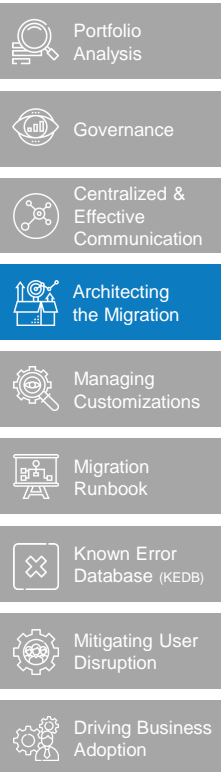


## Determine Migration Methodology

- Perform bandwidth testing
- Big Bang vs. Phased approach
- Full site migrations vs. Full + Deltas
- “Front door” migration or Azure Blob API migration
- DB Attach vs. Tool Approach
- (for on-premises)
- Determine correct tools
- Group sites based on priorities



## Execute Trial Migrations

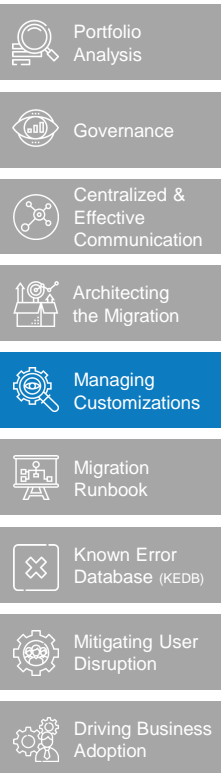




## MANAGING CUSTOMIZATIONS



# MANAGING CUSTOMIZATIONS



## Customization Importance

- How widespread is the use?
- How critical is the functionality?
- Can it be kept on the existing platform?



## Customization Type

- Commercial Off the Shelf (COTS)
- Open Source (GitHub / Code Plex)
- Developed by a vendor for your organization
- Developed in-house



## Options in Office 365

- Mapping to Out-of-the-Box functionality
- Licensing O365 version
- Similar open source components available
- Re-building for O365



## Migration Strategy

- Lift & Shift or re-write it better
- Leverage latest services & tools?
- SharePoint Framework or minimal re-write?
- Scripts for migrating settings
- Change Management

## RETAINED CUSTOMIZATIONS THAT ARE NOT DIRECTLY COMPATIBLE NEED TO BE TREATED WITH A NORMAL SOFTWARE DEVELOPMENT LIFE CYCLE

### Activities include:



Validating requirements



Designing solution



Implementing solution



Generating sample content



Deploying into a test environment for  
User Acceptance Testing



Negotiating on differences and correcting  
defects



Deploying into production ahead of the  
content migration



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# MIGRATION RUNBOOK





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# MIGRATION RUNBOOK












Your Migration Runbook should consist of a clear set of steps that can be repeated to successfully migrate content from your source to your target environment.





















The Migration Runbook should also be a living document that is revised as issues arise and remediation activities are standardized.



# SAMPLE SITE CONTENT MIGRATION RUNBOOK

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	T-30	Ensure proper contact information is available for key IT resources and business stakeholders		T-0	Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.
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				T-0	Begin delta migration
	T-14	Build / configure migration scripts		T+1	Thoroughly review logs
	T-14	Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.		T+1	Remediate problems raised from logs
				T+1	Update KEDB with new issues and remediation activities
	T-7	Schedule full migration of content in the background		T+2	Perform QA testing and validation of migrated content
	T-7	Monitor “full migration” job		T+2	Invite Site Owners for testing
	T-7	Compile stats of migration job		T+3	Receive formal Sign off
	T-7	Send communication to site owners for scheduled migration timeline. Include channels for 2-way communication.		T+3	Configure URL redirects and communicate to all site owners about go-live



## KNOWN ERROR DATABASE (KEDB)



# KNOWN ERROR DATABASE (KEDB)



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A Known Error Database is an important part of ITIL methodology for documenting root causes and work-arounds for errors that have occurred in the past.



Leverage your service desk knowledge of your platform and your past experiences with the environments to define the initial KEDB.



It is critical to build on top of your KEDB as the migration progresses.



Ensure proper workflows for upgrading your migration run books when an error is detected.



Assign a team to discover potential problems with already migrated content.



# MITIGATING USER DISRUPTION

# MITIGATING USER DISRUPTION



Look at the process from a site owner's perspective

- IT tells me that they are moving my stuff to a different platform
- The new platform will have differences, will I continue to be able to be productive with how I use my sites?
- Who can I contact to ask questions?
- I'm told that I don't have access to my content for some time, but this will impact my day to day tasks.
- My URLs are changing and it will be hard for my team to find what they need.
- What happens if the migration isn't successful?
- If IT says that it's successful, how can I be 100% positive?
- What if I have a problem, who can I reach out to?

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Strong and timely communications



Training and Webinars to help with platform changes



“Migration Questions” Yammer group, Shared Mailbox, and Open Door Sessions



Perform delta migrations to minimize the read-only window for each site



Implement a URL redirection strategy



Ensure that a fallback strategy is in place for sites that fail on the first try



Ask for feedback throughout the process and use that to improve your run book



Provide content validation reports showcasing all successes (and failures that were manually remediated)



Provide an easy way to contact the migration team during post-migration testing & sign-off





DRIVING BUSINESS ADOPTION 



## DRIVING BUSINESS ADOPTION



Converting the project marketing campaign into an ongoing marketing initiative

- Continuous “How-Tos”, lunch & learns, webinars, etc.
- Create an internal user group and recruit a power users & champions
- Showcase sites and business problems that are solved by using the platform



Treat governance as an ongoing set of reviews and improvements



Monitor usage analytics to determine if adoptions goals are met

- Google analytics is a common integration for more insights
- Microsoft has created a good Adoption Content Pack for Power BI





THANK YOU

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