



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

September 2018

Per industry-leading reports, the majority of IT Projects suffer from cumbersome processes & methodologies that don't add value. At TrnDigital we believe in partnering with our customers to establish shared value and drive results using emerging technologies and lean methodologies to maximize value.

We believe in eliminating waste at every step . We've built our team by handpicking full stack talent which deliver high quality at optimum cost

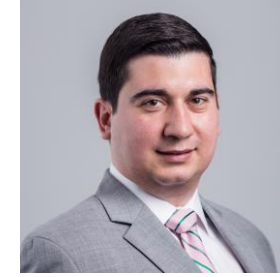


- Boston Based Start-up
- Focus on High Quality Solutions
- Bringing Together Industry Leaders in North America and India



Shailendra Singh

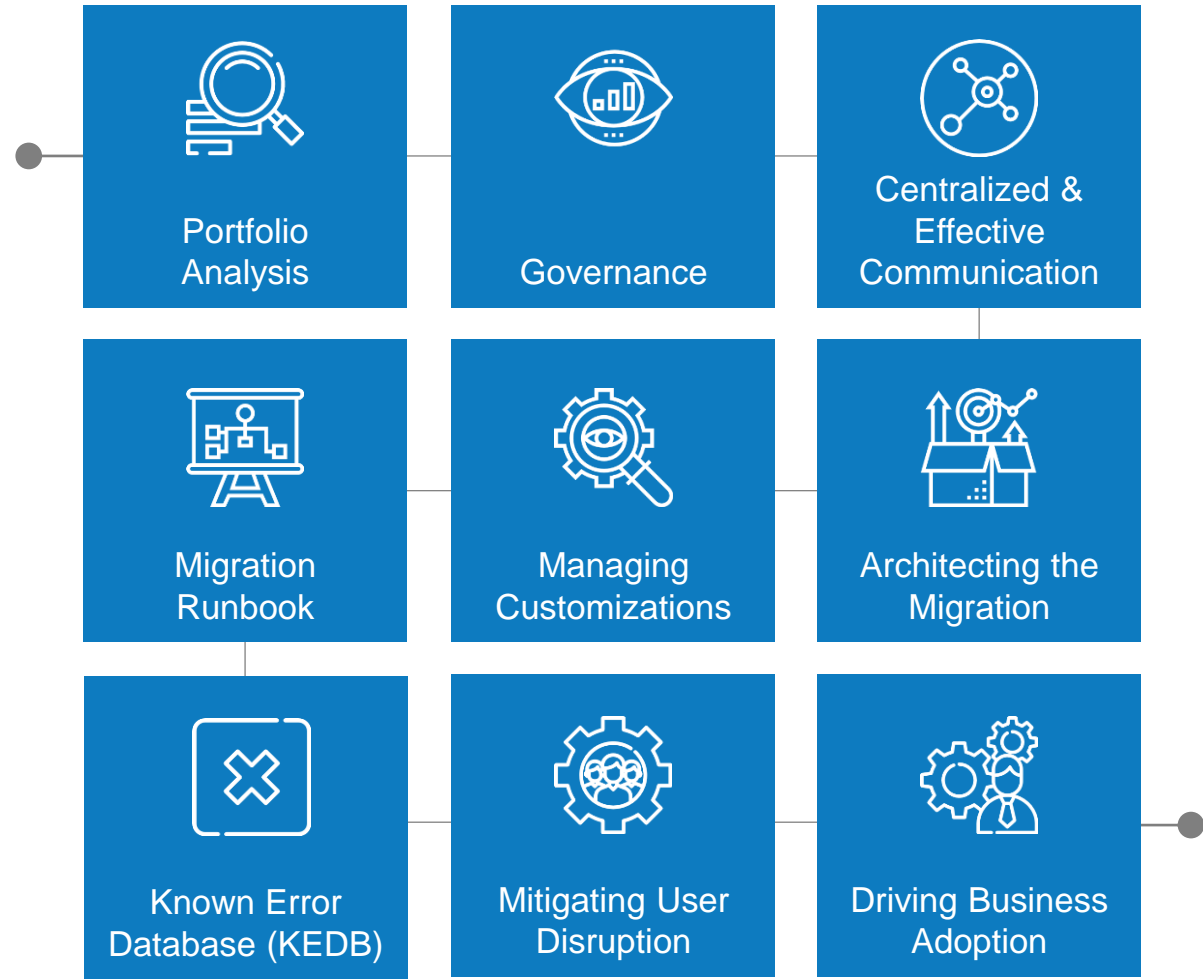
- Digital Business Partner
- Over 18 years of Industry Experience
- Strong background in emerging technologies and leading mission critical programs



Dimitri Ayrapetov

- Digital Technology Partner
- Over 10 years of Industry Experience
- Strong background in Digital Technologies
- Co-Founder of the Boston Office 365 User Group

KEY FACTORS FOR SUCCESSFUL MIGRATION





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

PORTFOLIO ANALYSIS

Your goal is to understand every detail of your environment



PORTFOLIO ANALYSIS

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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

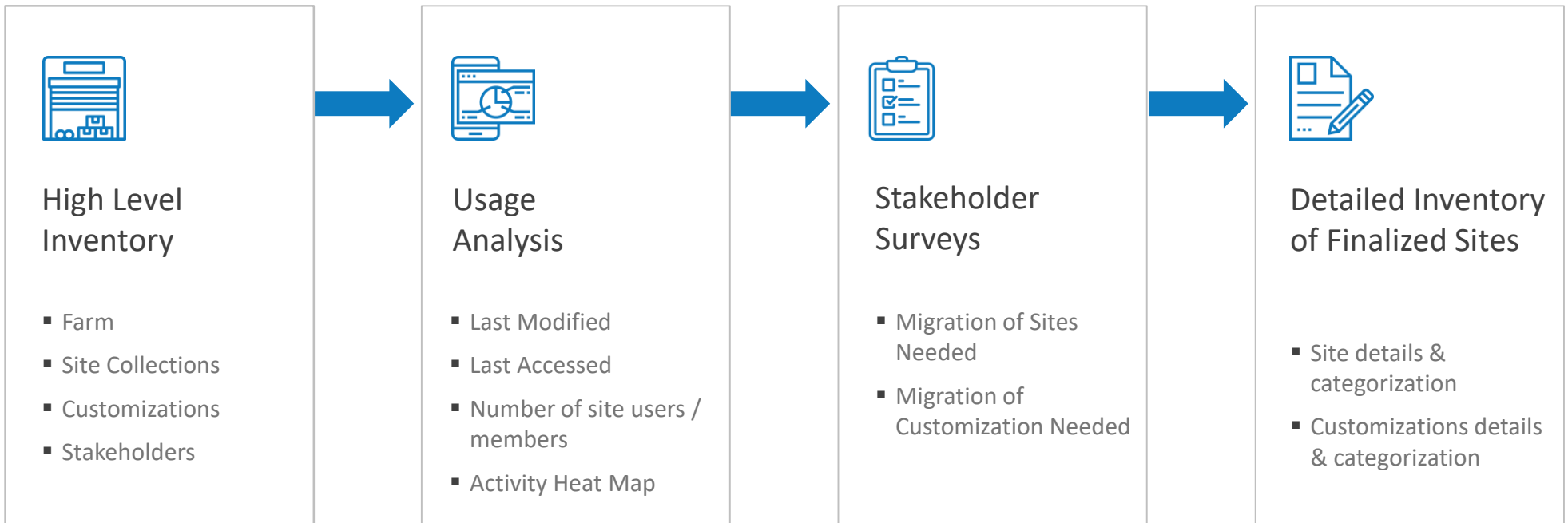


Stakeholders

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

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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





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GOVERNANCE








GOVERNANCE

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ASSEMBLE THE RIGHT TEAM(S)

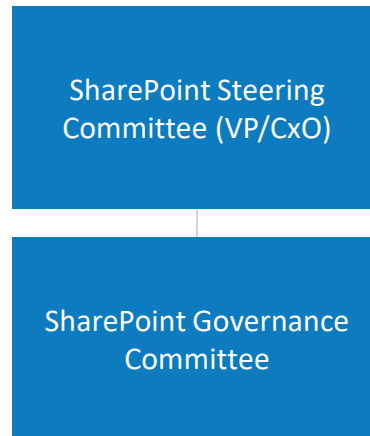
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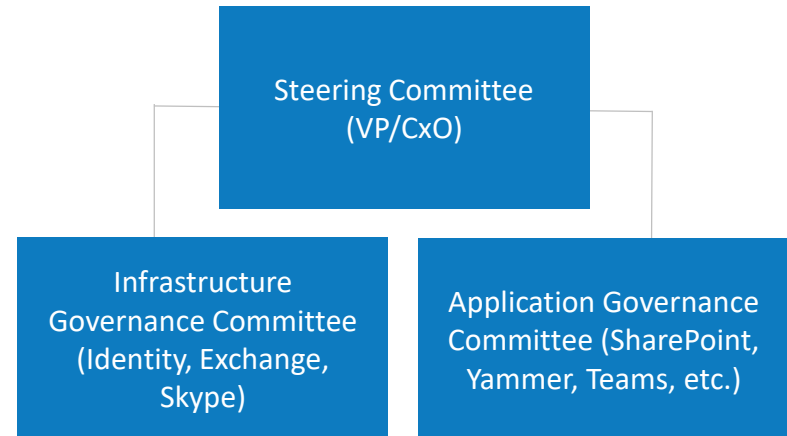
Small Companies



Medium Companies



Large Companies



DETERMINE GOALS & OBJECTIVES

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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

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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

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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



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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

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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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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

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MANAGING CUSTOMIZATIONS



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



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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

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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?

MITIGATING USER DISRUPTION

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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



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DRIVING BUSINESS ADOPTION 

DRIVING BUSINESS ADOPTION



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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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