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Office 365 Migration: 4 Elements You Cannot Overlook

To achieve a positive user experience, your project team must define and plan for four main elements: migration, communication, training and support.

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[Previous](#)

[Next](#)

TABLE OF CONTENTS

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The Migration Plan	5
1. Staged Exchange Migration	5
2. Cutover Exchange Migration	6
3. Hybrid Exchange Migration	6
The Communication Plan	7
The Training Plan	7
The Support Plan	9
Conclusion	10

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[Previous](#)[Next](#)

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As a delivery manager of Hybrid IT & Cloud Services at [Anexinet](#), **HANK YEE** helps design, implement and deliver quality solutions to clients. Yee has over a decade of experience with Oracle database technologies and Data Center Operations for the pharmaceutical industry, with a focus on disaster recovery, and data center and enterprise data migrations. Most recently, he has utilized that knowledge to help clients in a different area, helping enable customer success in migrating to Office 365.

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Office 365 Migration: 4 Elements You Cannot Overlook

There is no denying there are significant benefits to moving your organization to Office 365: hosted email, security, Office Web apps, social networking and collaboration, among others. Despite these benefits, organizations may be hesitant to make the move because of the challenges of moving their workforce to Microsoft's cloud-based platform cost-effectively and without affecting productivity. However, migration can go smoothly if you have the proper plan in place.

Many articles on Office 365 migration focus on the technical side of things. While this, of course, is extremely important, it's only one aspect of the process. To ensure a smooth and successful Office 365 migration, every organization must devise a solid migration plan that also addresses each of these four less-technical elements: migration, communication, training and support.

The Migration Plan

When developing your migration plan, you'll first need to ensure your organization has the correct subject-matter experts (SMEs) on its migration team. SMEs include technical as well as business experts, such as Network, Exchange, Active Directory, Information Security, Communication, Help Desk and Desktop support leads. These individuals will play an important role in decision making, user acceptance testing and execution of the entire project. It's also beneficial to include a third-party integration partner, like Anexinet, that has the expertise to guide you through a successful migration.

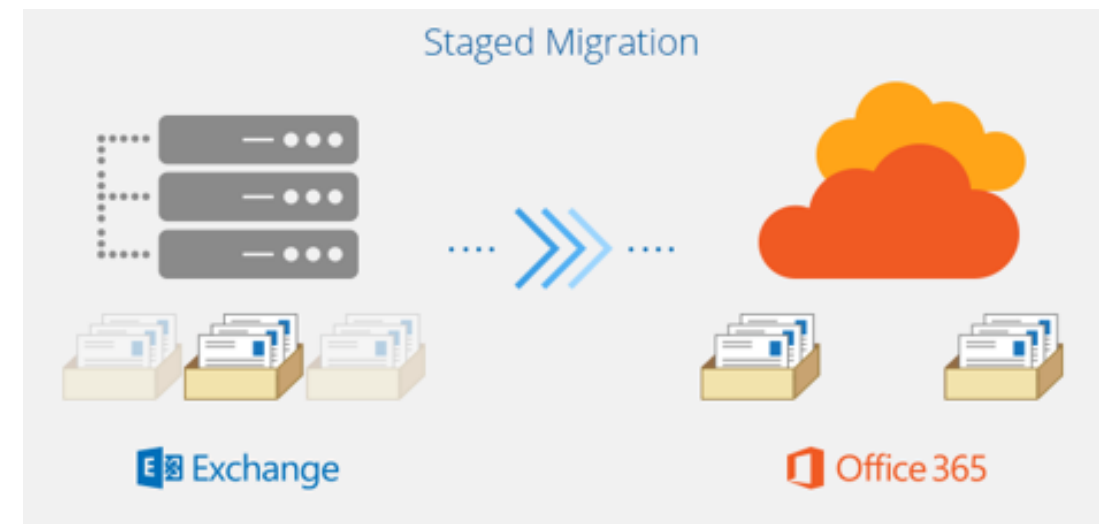
A migration plan is crucial to any migration. There are a few things to keep in mind when developing a plan:

- Stay within the budget.
- Maintain organizational security.
- Aim for a target completion date.
- Keep your users happy.

When developing an Office 365 migration plan, an organization may take one of three approaches:

1. Staged Exchange Migration

The strategy most commonly used by large organizations is a staged Exchange, or phased, migration. This strategy schedules the migration



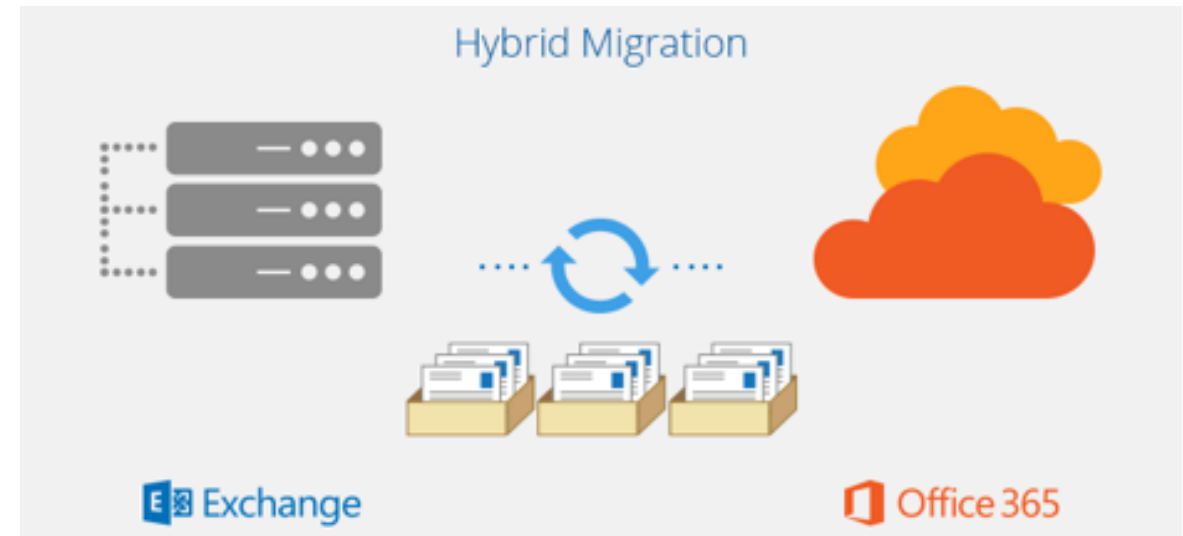
Source: CodeTwo

in “waves” based on an agreed upon timeline—according to the number of users and the amount of data that needs to be migrated—to complete the project.

As part of this strategy, always consider shared/resource mailboxes when creating your migration waves. Migration waves may be categorized in many ways: by geographical location, physical location, department or mailbox size. Regardless of which method you use, always consider users who have access or mailbox delegation to a shared/resource mailbox. As an example: Administrative assistants should be migrated with the individuals’ mailboxes they manage. The same goes for the accounting team—regardless of their geographical or physical location. Those who have access to the “accounting” mailbox should also be migrated in the same migration wave. While this will not always be an easy task, it will alleviate issues and support calls during the coexistence period.

2. Cutover Exchange Migration

This strategy is good for small organizations looking for a fast migration cutover (over a single weekend). A cutover migration is recommended for organizations utilizing an on-premises Exchange Server 2003 (or later) or an on-premises Exchange with fewer than 2,000 mailboxes.



Source: CodeTwo

3. Hybrid Exchange Migration

This strategy allows for long-term, cross-premises coexistence, in which your organization’s end state is both on-premises Exchange and Office 365. This approach may be required when some mailboxes or third-party applications that integrate with Exchange aren’t compatible with Office 365.

The hybrid Exchange migration approach allows an organization to keep one leg in the Exchange world and another in the Office 365 world, while also providing the capability to move a select number of users or departments at a time to Office 365, at a pace suited to the organization’s needs.

This approach requires your organization to set

up, or have in place, a hybrid server to host the connection between your on-premises Exchange Server and Office 365. You’ll also need to utilize directory synchronization (such as Azure AD Connect Sync), since a hybrid configuration relies on this.

Which strategy should your organization use? It depends on its environment, priorities and culture. When determining the ideal Office 365 migration strategy, ask, “What is the best way to improve the performance of our data migration, optimize the migration pace, minimize downtime and achieve a positive user experience?” Be sure to review the offering details of the various Office 365 licensing options available for your organization.

The Communication Plan

The content and cadence of your organization's communication plan are vital to the success of your journey to Office 365.

When developing a solid communication plan, it's best to start early to ensure the correct team members are included in the process, namely, executive-level members, technical writers and anyone from the corporate communications team to review and send the communication emails. The actual plans lay out exactly what communications should be sent, in what form, to what users and at what times. Most communication will be in the form of emails — mass emails, very targeted emails or both. It all depends on the specific situation and your organization.

Your organization will need to create a number of email campaigns as part of the overall migration. Here are a few suggestions:

Initial Announcement Email:

- Send at least 3-6 months prior to migration, depending on the size of your organization.
- Content should let your entire userbase know the organization has made the decision to move to Office 365.
- Include a list of benefits of the move and describe how Office 365 will increase productivity both in the office and remotely.

Follow-Up Emails:

- Send once or twice a month.
- These emails should contain a more detailed description of Office 365's benefits. For instance, include how Microsoft Teams can boost internal communication with its collaboration and chat features.
- Describe the capability for greater storage limits within Exchange/Outlook, OneDrive and SharePoint, as well as the added benefits of the suite's mobile features.
- Also include a high-level approach to any training that will be performed pre- and post-migration.

User-Wave Targeted Emails (1-2 weeks prior):

- Send approximately 1-2 weeks prior to a specific user-migration batch.
- This email should target specific users scheduled for migration in the next 1-2 weeks.
- Indicate the expected date the user is scheduled to be migrated.
- The content of the email should also include information on how and where to report issues, location of FAQs and any known or expected issues.

User-Wave Targeted Emails (1-2 days prior):

- Send 1-2 business days prior to a specific user-migration batch.
- This email should target users scheduled for migration in the next day or two.
- The content of this email should contain specifics on what tasks the user should perform and document prior to leaving the office the following day.
- The content should also include information on how and where to report issues, location of FAQs and any known or expected issues.

User-Wave Targeted Emails (day after):

- Send the day after a specific user-migration batch.
- This email should target users who have been migrated as part of the specific user-migration batch.
- The content of this email should congratulate the user on a successful migration.
- The content should also include information on how and where to report issues, location of FAQs and any known or expected issues.

The Training Plan

End-user adoption of Office 365 can mean the

difference between failure and success of your rollout, so it is important to have an effective training plan in place.

Developing an effective training plan means anticipating and documenting all the questions your users will have and providing them with adequate training materials. Take multiple approaches to training to maximize its effectiveness — along with your users' time. Following are training methods that have proved to be effective for various user types:

VIP-specific material: Specific to executive staff and assistants, the main focus is on giving the migration the “white glove treatment,” which consists of a select, dedicated group of technicians who are skilled at troubleshooting and interacting with executives. The executive’s assistant typically coordinates all VIP troubleshooting.

Onsite migration prep sessions: The target audience for onsite migration prep sessions is all user types, with the content including general information on what users will experience and what they will be required to do as part of the migration process. Included are a user migration demo and/or test, known/expected issues users may encounter during the migration, a catalog of items that will and won’t be migrated, and details of the post-migration support-request process.

Benefits of Office 365



Source: Comms Management

User Lunch & Learns: User Lunch & Learns should include a demo of the benefits and features Office 365 has to offer. These sessions should cover how to request permissions to shared mailboxes, how to save files to OneDrive, and how to properly and effectively collaborate using MS Teams (including chat and meeting scheduling). Consider including a deeper dive into Outlook's features, depending on your organization's level of expertise.

FAQ document: When transitioning to Office 365, compile a detailed FAQ document that includes what users should expect to experience as part of the migration. It should also include what users need to do prior to leaving the office the day before their scheduled migration, along with what will be expected of them following the migration. In addition, document any "known issues" and provide a running list of frequent questions (with solutions) being called in to the help desk to reduce help desk calls. Post this document on your organization's intranet and email the link to users as part of communications.

Live webinars (pre- and post-migration): Internal support staff or a third party should conduct live webinars that specifically cover pre- and post-migration questions and issues. This enables an organization to stay ahead of the game regarding documentation and helps reduce and even eliminate repeat questions to your support staff.

Intranet site information: Applicable information that your IT team developed as part of its testing and pilot experience should be placed on an intranet site. Include all material used to document the user experience around pilot migrations, FAQs, and feedback from pilot users and help desk scripts.

Support training: Support training materials are specifically targeted at your help desk, desktop and onboarding teams. Content should include specifics around Office 365 support training, including how support staff would add new users, delete users, change SMTP addresses, apply Legal Hold, apply mailbox permissions, create Microsoft support tickets, view the Office 365 Service Health Portal and perform [Office 365 connectivity testing](#).

The Support Plan

When migrating to Office 365, an effective support plan is critical to ensure your organization functions seamlessly, without any loss in productivity. The first step in developing a support plan is to identify all the teams in your organization that could be affected by a support or escalation call.

The following should be included in your support plan:

Onboarding process: Developing an onboarding process and designating the responsible teams (post-migration) is a critical

step. At some point, your organization will need to stop creating mailboxes via a legacy process and start creating them using Microsoft's recommended method (the Microsoft Azure Active Directory Synchronization Tool or Microsoft Azure Active Directory Sync Services) to synchronize/create on-premises users in Office 365. After migrating mailboxes to Office 365, you'll be able to manage user accounts on-premises via Active Directory, which would then synchronize with Office 365. For additional information on directory synchronization, refer to this Microsoft article on [directory integration](#).

Help desk process: Ensure all help desk processes are in place at least one week prior to production migration, so that your team will be available to handle support calls instead of having to tidy up help desk scripts and processes at the last minute.

Escalation support: Developing and implementing a well-designed escalation path for Level 1, 2 and 3 support prior to migration ensures your support staff is well aware of and comfortable handling high-priority issues and knows who and where to escalate them to, thus reducing user frustration.

Equip support teams: Ensure all support teams are informed about migration dates and which users are being migrated. Provide them with adequate training and materials for troubleshooting.

Specific call-number option: Provide a specific call-number option for users experiencing migration-related issues. This allows your help desk to handle migration-related calls more efficiently as calls will be directed to a support tech who will be immediately aware the user is inquiring about an Office 365 or migration-related issue.

Ramp up support staff: To eliminate extended wait times due to increased call volumes and walk-up visits, increase the number of support techs available during and after the migration.

Analytics: Collect, analyze and send to requisite stakeholders daily analytics. Doing so allows stakeholders and technical support staff to implement processes, technical needs or help desk scripts required to efficiently handle any issues that arise during and after the migration.

Conclusion

The decision to move to Office 365 is a milestone for any organization, but users must be on-board for the migration to be successful. To ensure user buy-in, it is crucial for organizations to clearly lay out the benefits, such as improved productivity and security, and provide users with the necessary training and support. That is why achieving a positive user experience must include comprehensive migration, communication, training

and support plans. With such plans, users will better understand the benefits of Office 365 and will get the proper training and support to get the most out of the migration.

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