

SkySync

Migration Planning to SharePoint Online

Business Considerations

As Microsoft's Office 365 thunders through the productivity and content management space, many early cloud storage adopters are looking to migrate to the tried-and-true, cloud-based SharePoint Online for their file storage and sharing needs. Before jumping ship from your current storage provider, there are many important steps that your organization needs to consider to ensure the migration goes smoothly.

Business Considerations When Migrating to SharePoint Online

Scope Out the Entire Project

File migrations – especially those across very dissimilar platforms – are complex, with many different moving parts. Underestimating the challenges ahead can cause a project to delay or go over budget, costing an organization precious resources and putting information governance at risk. The first step to planning any enterprise storage migration is to scope out the entire project: Identify stakeholders and their responsibilities from the top-down. Know who your new and existing storage vendor contacts are. Establish timelines & milestones, and user adoption schedules before even considering moving any mission-critical content across platforms.

Demonstrate Value & Get Buy-In from Stakeholders

In order to ensure that the organization gets solid ROI out of its Sharepoint Online investment, it's important that its value can be demonstrated early to all stakeholders.

- Execs – Executives must be willing to champion the new system and serve as a role model for new, better information governance strategies.
- Support – Support staff must be ready and willing to train users on the functionality of the new system as well as enforce new governance and content management policies.
- Users – Users must be trained in the new system and willing to follow the information governance policies established by IT and executives.

Fully Understand Your Storage Environment

Many organizations lack insight into their existing storage environment; users often store information in siloes – on their desktops, within their email inboxes, on network drives and in their cloud storage accounts (including both corporate and personal accounts). Additionally, many organizations are hanging onto content that could easily be archived or purged entirely so it's important to take stock of those files so they can be properly managed during the migration.

It's also integral to learn each system's rules of file management. Many platforms have differences in file name and length requirements, metadata structures, permission models, user account management functions and other significant unique features. These

potential challenges will need to be anticipated before systems can be truly integrated. Fully understanding where your content siloes exist as well as the related user experience when it comes to accessing and sharing documents will reduce potential friction during your SharePoint migration.

Exclude Unnecessary Content

A migration into a new system is the perfect time to reorganize your content. Instead of "lifting and shifting," a little extra planning paired with the right migration tool can enable an organization to restructure their content while it's in-motion. Since you've already examined your storage environment and identified active and inactive files and/or folders, you can tag them for migration, archival or deletion.

Once you know you're only moving required content and leaving the "junk" out of the migration, you can establish better governance strategies and best practices when the new system is fully deployed. And letting your migration tool filter out outdated content instead of reorganizing and restructuring manually can save hundreds of IT hours.

Architect Your SharePoint Environment Before Moving Content

As part of the Research and Development stages of the migration, it's critical to build the new SharePoint Online environment to suit your organization's needs. By doing this ahead of time, information governance strategies can be incorporated into the infrastructure so following them becomes a natural part of the user adoption process rather than an additional learning curve.

- **Build Site/Library Infrastructure** All new SharePoint Sites and Libraries should be created and secured with appropriate permissions ahead of time so that users are able to hit the ground running once their content has been migrated and they're ready to switch to the new system. This type of greenfield deployment will enable the use of templates without being restricted by existing taxonomy and site structure, saving time and resources.
- **Create a map for metadata and user permissions** Map out your existing user & group permissions as well as extended metadata before migrating your content.

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Catalog your metadata fields in your existing system as well as how you want those fields to be populated in SharePoint online – once that map is created, your migration tool should be able to match and preserve your extended metadata across platforms.

Provision user accounts and groups within SharePoint Online. When migrating files and folders into those accounts, your migration tool will then be able to map and/or automatically transform user permissions to the equivalent level of access in SharePoint Online. This will save many hours of manual labor, and reduce risk of employees being able to access or share documents they should be restricted from.

Choosing Your Migration Method

Perhaps one of the most important components of planning out your SharePoint Online migration is choosing the best method to get the job done. Typical migration methods include custom integration development, rudimentary copy, vendor import services or third-party tools. SharePoint Online is much more than a content repository. Many “old school” migration methods fail to take into account permissions, document versions, metadata and other SharePoint-specific file capabilities.

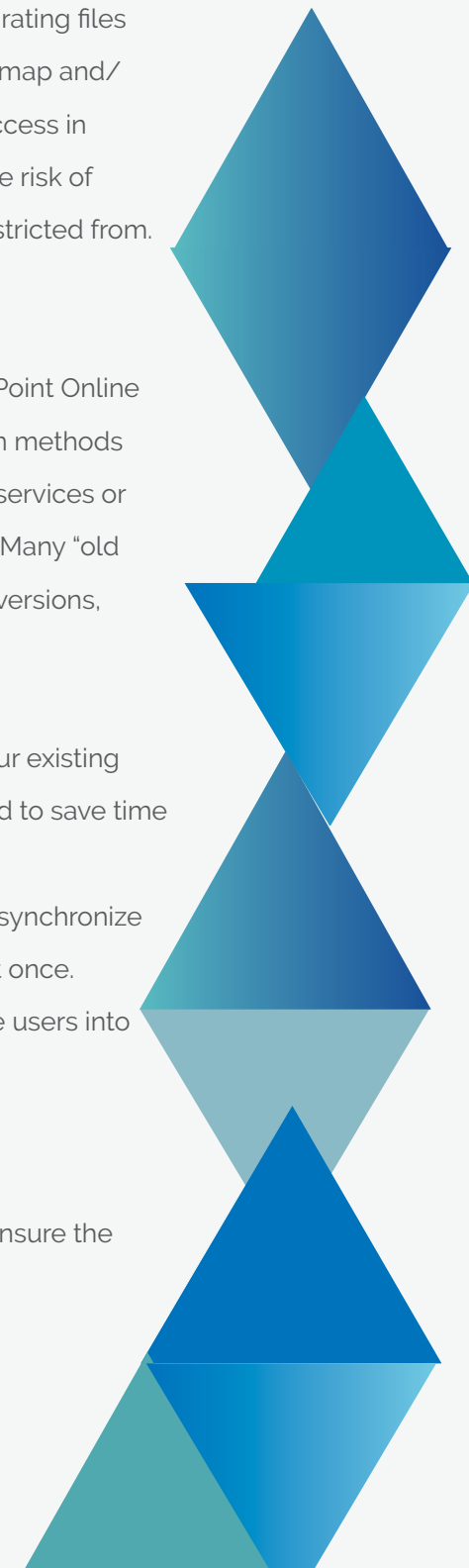
You’ll want to deploy a tool that that can tightly integrate SharePoint with your existing storage system(s), preserve your existing file infrastructure and is guaranteed to save time and money by automating as much of the process as possible.

Another important factor to consider in your migration tool is whether it can synchronize the two systems instead of forcing you to copy or migrate your content all at once.

This ensures that your existing system is still fully functional while you phase users into SharePoint Online.

Pilot Test Your Migration With Early Adopters

Instead of moving everything at once, a beneficial way to mitigate risk and ensure the success of a migration is to take things slow.



Start with a small batch of users so that any hiccups with the migration are discovered early and can be ironed out (while the bulk of business operations are still being managed within your older platform) before they cause widespread chaos. Other benefits to beta testing your migration:

- Ensuring users are trained in the new system and can champion its value
- Establishing a set of file sharing and governance policies as well as best practices through early adopters
- Mitigate IT burnout by providing training and resolving support tickets in small waves

Have a Backup Plan

Your organization will likely want or need to have a fall-back in case your migration goes awry. Another benefit of keeping SharePoint Online synchronized with your previous storage platform is that it provides a seamless backup in the event of any technical or user adoption hurdles so your business can still continue as usual; if you need to access your old system, all of your content will be right where you left it.

Summary

By planning ahead and anticipating the common challenges associated with large-scale file migrations, it will be much easier for your organization to make a smooth transition to SharePoint Online, increase productivity and deliver a positive experience for the users involved.

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