
10 steps for a smooth migration to Office 365

A decision-maker's guide



Getting started

The move to the cloud with Office 365 can open up entirely new ways for your team to work and collaborate wherever they are.

Now is a great time to reimagine how your team could work, and what they'll gain from Office 365 - like reduced travel costs and the ability to work remotely and spend more time with customers.

Office 365 can boost your productivity and collaboration, giving you all the scalability, security and ease-of-use of cloud computing, without the technical limitations of on-premise systems.

The migration path to Office 365 isn't without pitfalls. From unexpected

add-ons to a lack of experience, there are plenty of ways to stumble. Make sure you have everything in order before you start.

We've helped businesses of all sizes make the move to Office 365 and have 10 sure-fire steps that will support you on your journey.

Here are

OUR TEN TIPS

for a smooth
and easy
migration



01.

Do your homework

Migrating to the cloud can be challenging for a seasoned IT pro, let alone those of us with no real experience who fit it in around our real job.



To start off right, take stock of where you are now before you decide where to go next by asking the following questions.

1. When is the right time to change and what is the best approach for migration?
2. Can we move fully into the cloud or do we need to take a hybrid approach?
3. What apps do our people need to use and on which devices?
4. Do we need to make any changes to our current environment to be ready to migrate?
5. Will there be any compliance or regulatory issues, such as data sovereignty?
6. How will our data be protected and what happens to our data if we want to leave?
7. How can we get the most out of our existing investments and control costs?
8. What is the best way to purchase and be billed for the licenses?
9. What skills will be needed before, during and after the migration? Can we get local support when we need it?

02.

Integrate old with new

Migration to Office 365 should be a plotted course, not a leap of faith.



Chances are that you will need to start with a hybrid approach.

Unless you're planning a greenfield deployment of Office 365 or you're already using cloud email solutions, then you're looking at a migration from your existing on-premise environment.

Start with a hybrid approach using your current on-premise system, Office 365 and any other cloud apps. This provides a way to learn best practices while minimising risk. It gives you the

flexibility to grow, organise and operate in any setting, while not having to throw away previous investments. Later on, it also gives you the option to decide if you want to go all-in with Office 365, maintain a mix or even remain on-premise.

Every business is different. How well do you know your own hardware, software and network configuration? This leads us to step 3.

03.

Assess your readiness

Having visibility of your entire environment will set you up for a successful working system post-migration.



Start by mapping out your current state across:

- **Infrastructure** - if you have Microsoft Exchange or SharePoint running on-premise, take note of how they are set up
- **Assess your Active Directory** to identify and plan for any remedial actions
- **Desktop and mobile devices** - evaluate your devices, operating systems and licenses
- **Network** - review your networks and check for any bottlenecks or barriers that may create issues when moving to a cloud-based environment.

Check out the Office 365 system requirements [here](#).

Focus on email:

- Email flow diagrams - both inbound and outbound, before and after the migration
- Existing email-related infrastructure, servers, security, network and access policies (for documents and email), and firewall owners and rules.
- Email DNS MX and A records

- Mail-enabled apps (SMTP and MAPI) and devices eg Office productivity tools and plugins, CRM, scanners and web browsers
- Mailbox details such as shared folders, shared calendars, mailbox and archive sizes
- Certificate infrastructure.

Boost your bandwidth:

Depending on the data volumes you're transferring, a **migration** could put pressure on internet capacity and speed. You may want to consider upgrading to help you through the migration.

To get the most out of Office 365 **day-to-day**, without worrying about performance and cost, now would be a great time to upgrade to a flat-rate corporate internet plan. You are likely to rely more on your internet connectivity so resilience options, like automatic failover to the mobile network, should also be considered.

04.

Choose the right options

Office 365 has a number of different licensing options, so it's important to know what you gain (or lose) before you choose one.



Is your workforce static, or seasonal? Does your business need flexibility, or are you happy to make a longer commitment?

There are many options available and your choice will depend on whether you want to be able to change your users and your plans as your business expands or contracts.

You also have options when it comes to payment. Choose to pay per-user-per-month, or annually. Whatever suits your business.

Control your licenses

Make sure your service provider delivers a dashboard to track who is using what and can include all your apps on a single bill.

05.

Match people to apps

You need to cater for a range of needs, from desktop to mobile workers and varying levels of technical competency.



The most successful deployments depend on carefully matching new tools with different working styles and helping your people get up to speed quickly and realise the benefits.

Select the services you need from the different plans available:

- Office online: online versions of the Office apps, accessed via a browser
- Microsoft Office apps: fully installed apps on desktop and mobile devices including Word, Excel, PowerPoint, Outlook, OneNote, Publisher, business-class email and calendars
- Skype for Business: online meetings, instant messaging and integrated audio, video and webconferencing
- Advanced features: hybrid deployment, Project Pro, Yammer Enterprise, Visio Pro, Enterprise Excel Business Intelligence and extended IT controls.

Match apps to users using a profiling assessment:

- Are they desktop workers, mobile workers, or a mix of both?
- Do they work from home, on the road or just in the office?
- Will you need to provide temporary access to contractors and federate partners and customers?

Asking these questions will help you pair people with the apps they need and ensure they get full functionality - saving them from being swamped with apps they'll never use.

06.

Document your decisions

A migration is a big project and you need a clear roadmap before you even start.



Set your target outcomes and the criteria you'll use to determine success and document everything as you go.

Unless you're a small business with limited amounts of data, you'll need to implement a staged migration. This will give you time to gather initial feedback, customise your training and deal with any glitches before they become serious issues. That way you'll smooth the way for future migrations.

Plan your migration with these key steps:

- Migrate pilot users, stabilise and review the impact on business processes
- Closely examine the quantity of emails and data/email content and refine your plan to ensure your after-hours migrations align with network speed and bandwidth

- Review operational performance and fix any issues
- Migrate all remaining users, stabilise and assess the impacts
- Retire old systems and support processes
- Evaluate its success against your business objectives.

07.

Make the move

Successfully moving from on-premise servers to the cloud can require some heavy lifting.



Simplify your migration by cleaning up your data and take advantage of clever tools to ensure you're only migrating relevant and up-to-date content.

Basic springcleaning tasks:

- Check your Active Directory dependencies - ensure your objects are as they should be
- Disable, delete or archive any unused mailboxes, users, public folders and SharePoint libraries and sites
- Update Windows, Microsoft Office and browser versions to meet minimum system [requirements](#).
- Connectivity tools: such as the [Exchange Remote Connectivity Analyser](#) Tool and the [Microsoft Remote Connectivity Analyser](#) to ensure you have no connectivity or internet speed issues
- Powershell: a task automation and configuration management framework that removes a lot of the manual and repeated tasks.

Migration tools and applications available:

- Auditing tools: MAP for Online Services, Exchange Best Practices Analyser and the Deployment Readiness Tool allow you to make sure your Exchange environment is ready for moving to the cloud

08.

Communicate changes and create champions

As you introduce the new apps into your business, know what is required to help your people get up to speed.



You can expect both resistance and impatience from your people so set clear expectations upfront.

Target your deployment. Create a pilot group to receive Office 365 first - managers and mobile workers are often great candidates - ensure these people see the benefits fast. Ideally have a range of existing IT skills within this group. That way you'll have created a team of champions to help those less familiar with the new apps.

Run training and coaching that gets your people excited about the new tools and what's in it for them. Have your business owners or managers explain the investment and the benefits they're anticipating.

Make sure you communicate the key differences between old software and new. Consider investing in end user training, or you can access Microsoft training videos and other step-by-step guides and resources [here](#).

09.

Enlist the right support

In most cases, you will need some specialist ongoing support once you're set up.



Answer the following questions to determine your ongoing support requirements:

- How will we manage and monitor our environment to ensure it remains reliable?
- How do we maintain our current internal service levels for mail?
- What is the process for managing change?
- What's the best way to handle enquiries from our people?
- Where does our service provider stop and Microsoft support start?

If all this is new to you, or you're stretched managing other issues, get appropriate help for the migration. You'll benefit from ongoing support from local experts who know Office 365, and your business, inside-out.

10.

Get the right team

Working with the right people can make managing your migration, and achieving the right outcomes, a whole lot easier.



Spark can bring together world-class tools and solutions with local knowledge, infrastructure and support to make your migration fast and smooth, and give you the right levels of ongoing support.

If you're keen to get going, but unsure whether your team has the time or skills, talk to us about how we can help before, during and after your migration to Office 365.

Find out more

To find out more about our products and solutions, see:

businessapps.spark.co.nz:

One place to find, buy, use and manage all your business apps. Features include single sign-in, administrative dashboard, monthly contracts and both onsite and phone support.

Office 365 onboarding services:

To assist your migration to Office 365, take advantage of our experienced onboarding team and proven tools and processes.