Enterprise IT Checklist: Migrating to Microsoft 365

It's very common for businesses to migrate their on-premises business data and mailboxes into a subscription-based cloud service like Microsoft 365. According to Osterman Research, the most common reasons an enterprise considers the change include:

- Improving cybersecurity
- Improving internal communication
- Managing corporate records
- Improving user productivity
- Reducing the cost of IT operations
- Streamlining IT operations
- Controlling overhead
- Improving data chain-of-custody management
- Responding to regulatory mandates

But, migrating data isn't a simple feat. That's why it's critical to carefully plan and execute your migration to avoid:

- Chain-of-custody problems
- Corrupted data
- Loss of sensitive data
- Violation of privacy statutes
- Lost employee productivity

If your organization is considering a migration to Microsoft 365, review the following information for a proper migration that allows your business to keep running effectively throughout the process, and tips for maintenance once the migration is complete.

Pinpointing Migration Difficulties Early

There is no getting around it, the migration process is complex. Depending on what system you're migrating from, moving to a cloud system can impact your existing business processes and your entire data infrastructure.

To ensure a seamless transition, first, understand the most common frustrations enterprises experience while going through migration. Osterman Research pinpoints the following are common pain points in the migration process:

- Ensuring all links and access to all shared resources continue to work
- Managing co-existence of email during the migration process
- Educating and supporting users during the migration process
- Pre-migration planning
- Configuring the migration solution
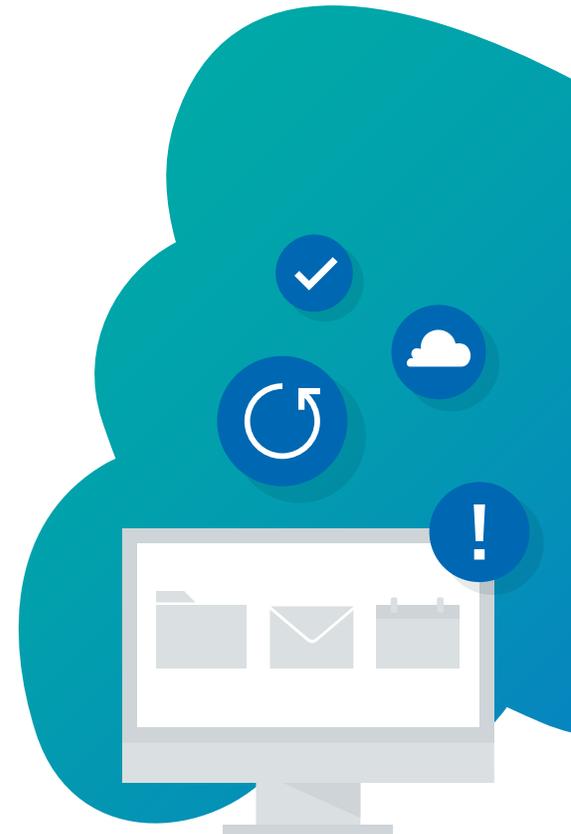
- Organizing the groups to migrate first
- Managing multiple email domains during the migration process
- Tracking the process of the project

9 Steps to Migrating to Microsoft 365

By understanding the issues that can arise during a migration process, you can anticipate and plan for (and around) them for a smoother process.

And, while there are a number of methods that can be used to migrate to a new collaboration platform, such as Microsoft 365, Osterman Research recommends the following 9-step approach.

Step #1: Determine How Microsoft 365 Will Be Used

To understand the scope of your project, you'll need to first ask yourself some questions:

- Will specific capabilities from Microsoft 365 be used, or will the entire suite of capabilities be employed?
- Will a hybrid approach of cloud-based and on-premises services be used, or will everything be delivered via the cloud?
- Are there competing or complementary IT initiatives being undertaken within the organization?

Learn how these questions will determine your migration plan, and how they might impact your ability to fully migrate data.

Step #2: Determine if Microsoft 365 Will Be "Right-Sized"

One of the fundamental advantages of Microsoft 365 is that Microsoft offers a number of SKUs for different capability levels and industries. For example, Plan E3 offers fewer capabilities than Plan E5, but at a significantly lower cost. Plans can generally be mixed and matched to drive down the cost of Microsoft 365.

Before moving forward with a migration strategy, identify which plan suits your business best.

Step #3: Understand the Limitations of Microsoft 365

While Microsoft 365 is an incredibly powerful tool, there are limitations on the platform, including:

- Maximum attachment sizes
- Blocked file types
- Migration throttling
- The default and maximum retention period for deleted items
- The length of file names for upload to SharePoint Online or OneDrive for Business
- Unsupported characters in file names

These issues can make it difficult to transfer or uncover data throughout the migration process. To mitigate, most businesses add a layer of data backup protection to their initiative.

Step #4: Create a Pre-Migration Checklist

From determining the content that will be touched during the migrations to understanding your existing firewall architecture (and everything in between), a migration plan will be one the most important steps to decreasing the chance of errors or slow migration that often occurs during large data transfers.

To see a full pre-migration checklist, check out our whitepaper:
Migration to Microsoft 365: A Step-by-Step Guide.

Step #5: Ensuring the Right People are Available

The migration process requires a wide variety of skill sets. And, many organizations, especially those that operate with a lean staff, may not have all of the resources available at their fingertips.

Osterman Research says that more than one-third of organizations use third-party vendors to help plan and execute their migration strategy.

Determine if your organization has skill gaps, or technology gaps, and what you can do to rectify the issue, before starting the migration process.

Step #6 Understanding Compliance Requirements

When transferring data, especially sensitive consumer data, it's imperative to understand compliance requirements. Requirements like the European Union's General Data Protection Regulations (GDPR) and the California Consumer Privacy Act (CCPA) will force businesses to look at:

- How you manage email archives
- How your chain-of-custody will be maintained
- How your data is encrypted
- Where your data is physically stored

Without proper attention to detail during this step, your business could wind up with fines and a damaged business reputation.

## Step #7 Creating Migration, Backup/Recovery, and Continuity Plans

The migration checklist isn't the only type of documentation you'll want to write down as you go through the migration process.

You'll also need to connect your understanding of your IT infrastructure, business goals, and timelines into a solid (and comprehensive) migration plan.

This includes planning for continuity and planning for data loss:

- How will your organization recover individual files, or mission-critical data, in the event it is lost?
- How will your employees stay productive during the migration process?

Learn more about the importance of planning for business continuity.
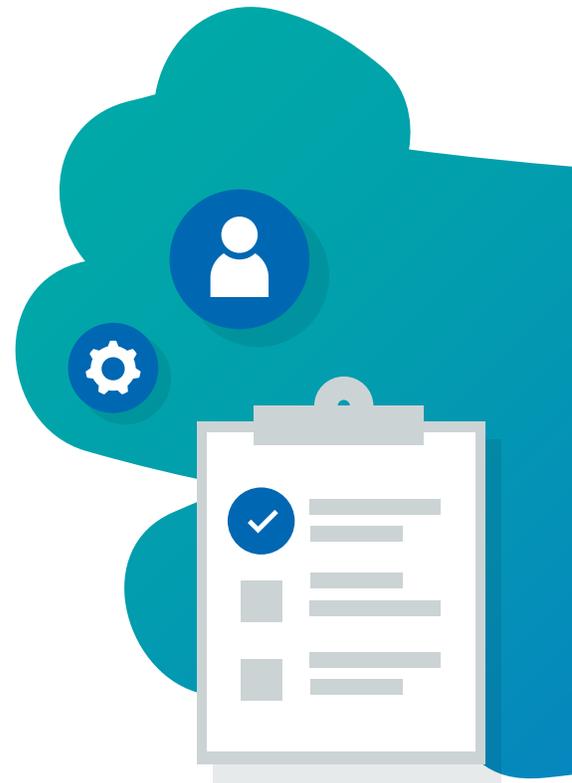
Step #8 Migration to Microsoft 365

Planning for the migration is only half the battle - the other half occurs when you actually implement your research and planning.

Migration can take a week to several months depending on the size of your organization and the volume of mailboxes and data to migrate.

From running a pilot of the migration to learning how to handle unused mailboxes, following best practices during the migration process is the key to success.

Step #9 Migrating .PST Files, and Migrating Files to OneDrive

As a final step, if your organization uses .PST files, you'll want to determine which files should be included in the migration process.

To pinpoint the critical documents, you'll want to analyze:

- The content inside the files
- Identify data that might be subject to compliance requirements
- Involve legal and compliance teams to help

You might also consider using Microsoft OneDrive for Business as your venue for storing and sharing files.

Equipping Yourself with Tools for a Successful Migration

Going at a migration process alone can be rife with problems. That's why so many businesses opt to have a third-party solution for part or all of the migration experience. Specifically, most businesses consider tools that can help with:

- Business continuity
- Compliance
- Security

And, any other tool that will make life easier for your administration and IT staff.

Especially data backup.

Any organization going through the migration process, and that continues to use Microsoft 365, should have a reliable, third-party backup capability that is separate from Microsoft 365. This ensures protection of your data as you make the transfer, and after migration, when native backup options aren't enough.

**See a full list of migration must-dos in our latest whitepaper:
Migration to Microsoft 365: A Step-by-Step Guide.**

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