

# STRATEGIC MIGRATION OPTIONS

## MASS MIGRATION

Users are migrated in mass cut-over during one outage window often necessitated by security, time constraints or shared resource complexity.

1. Requires extensive planning and preparation
2. Large, temporary post cut-over support event
3. Concurrent platforms likely
4. Risk of extended user productivity risks and disruption

VERSUS



## PHASED DEPLOYMENT

Users are migrated in controlled phases based on complexity, unit readiness, and location.

1. Requires extensive planning and preparation
2. Multiple, smaller, controlled temporary post cut-over support events
3. Concurrent platforms likely
4. Low risk of extended user productivity loss
5. Good for high complexity environments

## CONSIDERATIONS



- ▶ Support staffing: Mass cut-overs require large temporary support staff.
- ▶ Phased method allows smaller, consistent support staffing improving user experience.

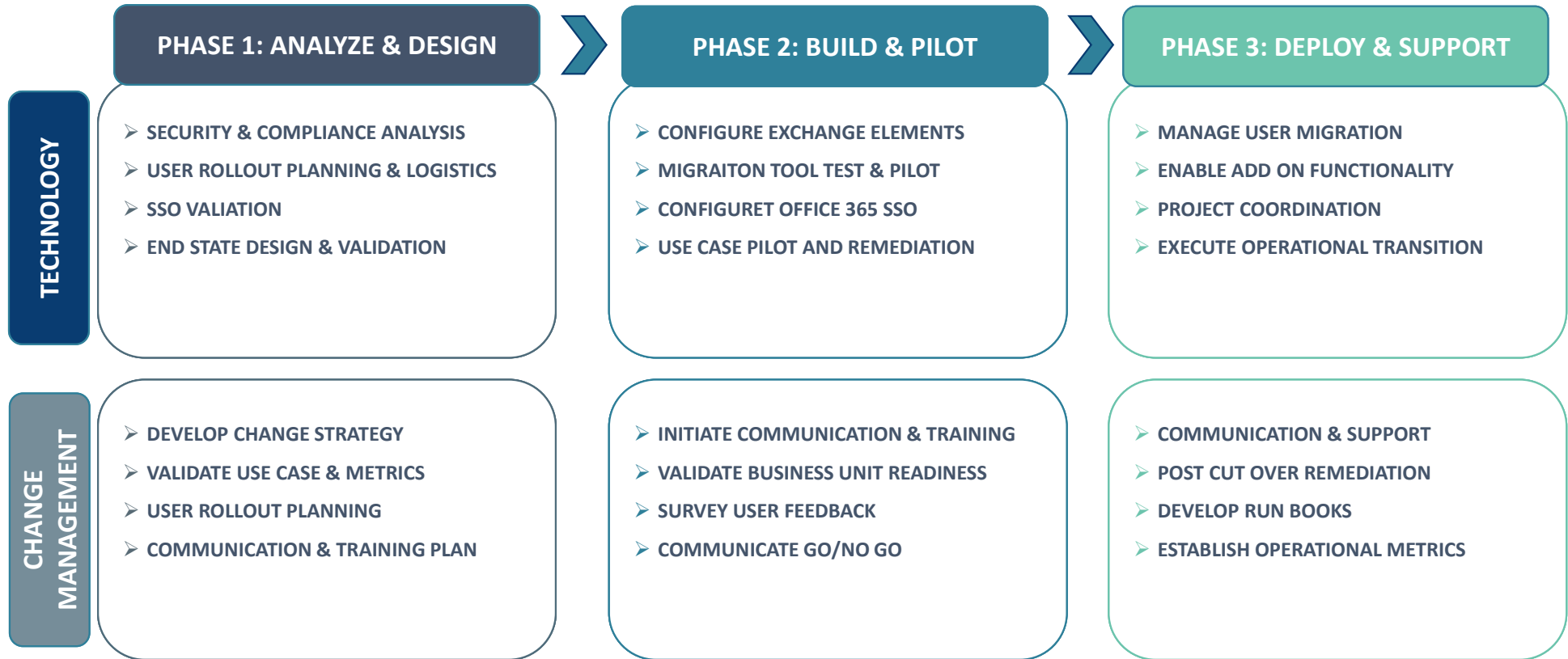


- ▶ System Interdependence: How integrated are other centralized user systems?
- ▶ Are there version compatibility issues? Can they be isolated and run concurrently?

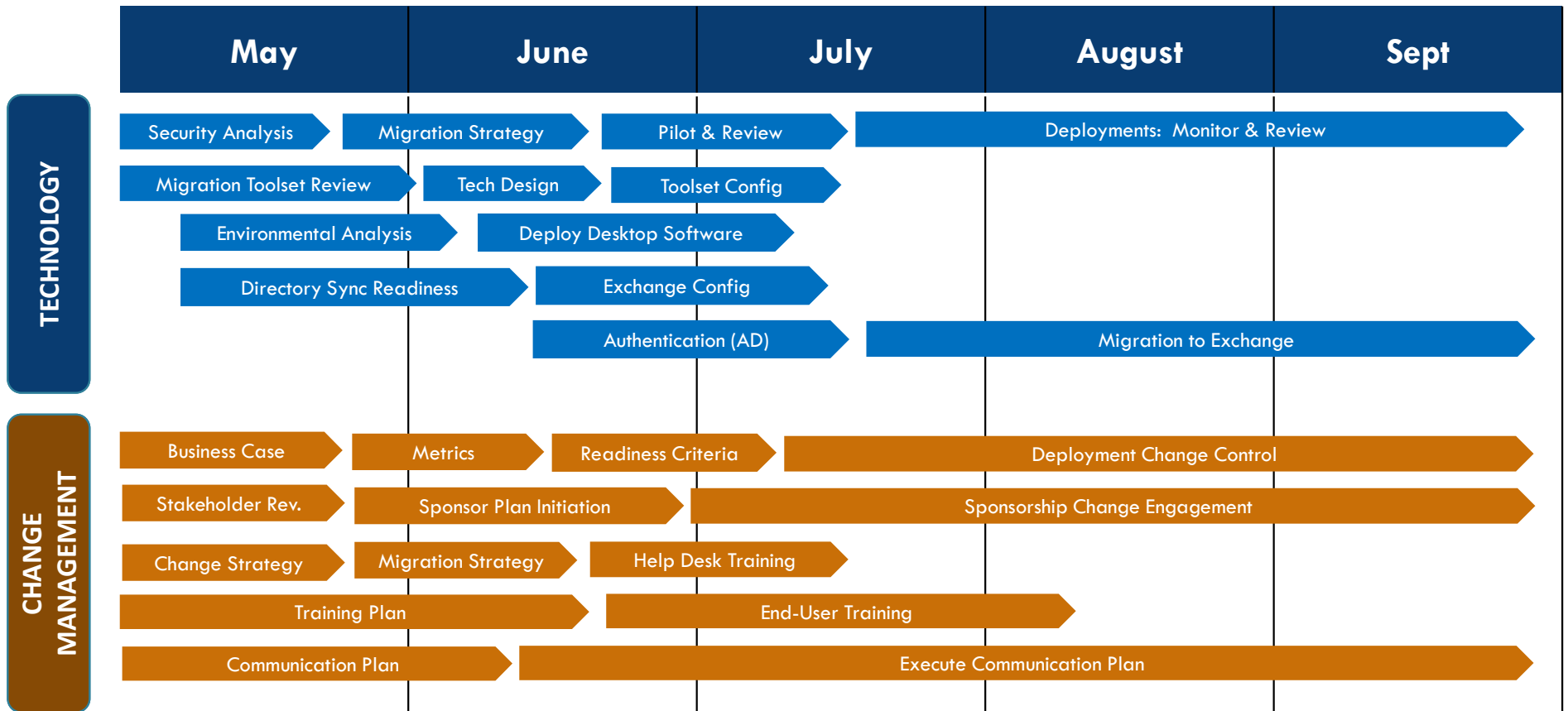


- ▶ User Map: Are there multiple locations? Are there differences in systems?
- ▶ What is the differences in user groups with regards to risk, and system usage?

# OFFICE 365 METHODOLOGY



# HIGH LEVEL MIGRATION TIMELINE



# PHASE I: ANALYZE & DESIGN

This phase focusses primarily on gaining an understanding of current state and developing an end state blue-print along with a roadmap for change.

## Phase Considerations

- What does a successful outcome look like? Tangible and intangible.
- What is the underlying business case justifying the project?
- How prepared are the users, management, and IT staff for change?
- How will this impact business operations, customers, strategic partners?
- What is the current state and maturity of IT operations, infrastructure readiness and security risk profile?
- What are the direct and indirect technologies impacted by the project?
- What is the final design for core technology elements and how does that fit in the existing IT stack?

## Key Activities

1. Executive and sponsor interviews validating business case, metrics and synergistic value capture
2. Develop project communication protocol and change control strategy based on existing standards and current state
3. Define collaboration, messaging, and hybrid systems requirements along with gaps
4. Review and validate proven migration tools appropriate for client environment
5. Define 'affinity groups' to inform or validate migration wave plans.



## Deliverables & Outcomes

- ✓ Facilitated Blueprint Workshops
- ✓ Exchange/O365/OneDrive Design
- ✓ User Test Cases
- ✓ Stakeholder Analysis
- ✓ Communication & Training Plan
- ✓ Migration Wave Validation

# PHASE 2: BUILD & PILOT

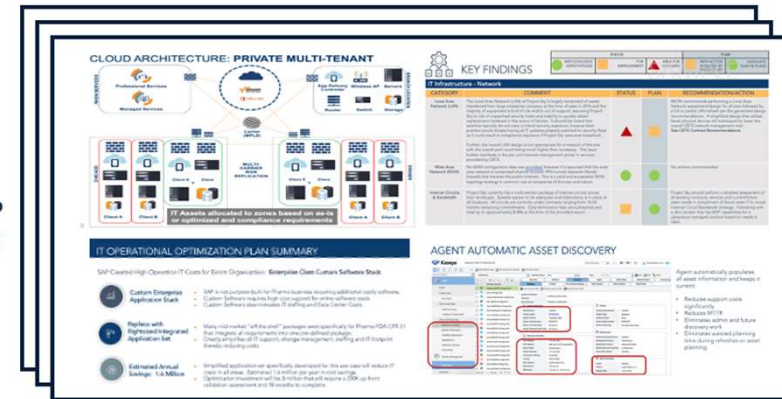
This phase focusses on the detailed design and technical solution including piloting functionality and deployment methodology.

## Phase Considerations

- Has the case for change been widely communicated and is the sponsor actively engaged in the process?
- Are users and key management ready to be part of the change and are they ready?
- What lessons have been learned from early stage piloting with regards to user engagement and rollout?
- Has pilot testing confirmed intended use and are stakeholders in alignment with shortcomings if any?
- Is the operational team engaged enough to prepare for long term success?

## Key Activities

1. Initiate communication and training plans
2. Build out approved to specifications the design
3. Configure Office 365 components and integrate any security elements
4. Perform end-to-end migration toolset validation dry run prior to license commitment
5. Packs and deploy software updates critical to environment
6. Engage a cross-section of client users to pilot all core use cases prior to rollout



## Deliverables & Outcomes

- ✓ Validated design through testing
- ✓ Roadmap and Deployment Plan
- ✓ Delivery of communication & training
- ✓ Sponsors engaged and visible
- ✓ Defined readiness assessments
- ✓ Facilitated "Go/No Go Process"

# PHASE 3: DEPLOY & SUPPORT

This phase focusses on the migration and deployment, identifying gaps in execution and adoption while performing change interventions as needed.

## Phase Considerations

- Is the project pace align with expectations documented in the deployment plan?
- Are lessons learned being captured and incorporated into subsequent deployments?
- Is the user support mechanism driving positive outcomes? Are runbooks working? Is training effective? Is staffing appropriate?
- Are user satisfaction and adoption at expected levels? Are any user groups trending that need to be considered?
- What are the root-causes of shortcomings? What additional steps need to be performed to address gaps (e.g., communication, training, staffing, sponsor)

## Key Activities

1. Execute change management plan including communications, training, and sponsorship
2. Monitor performance gaps, perform change interventions
3. Execute the phased deployment strategy designed to migration users, resources, shared mailboxes and public folders
4. Perform progress and lessons learned reviews adjusting plans and approach
5. Complete runbook and on-boarding handoff for administration, support and change management to client operational teams.



## Deliverables & Outcomes

- ✓ Deployment, support and user analysis
- ✓ Post-deployment retrospectives
- ✓ Execution of change interventions
- ✓ Users migrated and enabled
- ✓ RKON-to-Client transition meeting
- ✓ Champaign toast