Careful Microsoft 365 Migration Planning Delivers Recipe for Success

Whether merging two organizations or moving from on-premises to the cloud, migrating to Microsoft 365 can prove challenging. But detailed Microsoft 365 migration planning can make all the difference. Taking the time to identify the scope of the project and involve key stakeholders up front will save time and headaches in the end.

Successful Microsoft 365 Migration Planning Begins with the Right Questions

Asking the right questions from the beginning will help ensure a migration process that runs smoothly. This includes questions like the following:

- What data needs to be migrated – Migration presents the perfect opportunity to destroy redundant, outdated, or trivial data. This may also be the time to remove unused mailboxes and inactive databases belonging to long-retired teams. Streamlining the data to migrate saves both time and money.

- What time and resources will the migration process require – Once you know what data to migrate, you can estimate the timeframe and determine the internal and external resources needed. Be sure to commit enough resources to accomplish the migration quickly, with minimal impact.

- What order will the migration take – Determine what departments or data types need to migrate first. This should include choosing a small pilot project to test the migration process.

- How will the migration process impact end users – Will there be downtime when users cannot access email or other critical systems and documents? Will users need to log out? Finally, what training will end users require to navigate the system and use new features efficiently?

- Do existing policies still make sense – In addition to discarding outdated data, migration also presents an opportunity to review records management and security policies and update them as necessary.

Involve the Right People

Asking the right questions necessarily means involving the right people. IT staff need to be heavily involved in any migration process. However, to correctly determine what data needs to be migrated and what factors require consideration, other stakeholders also need a seat at the planning table.

For instance, a successful migration plan at a hospital should involve physician and nursing representatives, as well as HIPAA experts. Representatives from key areas can help ensure that the right data comes across in the proper structure. They will also provide valuable input regarding timing constraints and end user training needs.

Plan for Security and Regulatory Compliance

Industry regulations and state privacy laws govern how organizations treat critical data, including email and document storage. Consequently, organizations need to ensure that migration happens in accordance with those regulations, as lack of compliance can prove costly.

For instance, privacy laws such as HIPAA determine document retention periods. This will affect what data comes over in the migration and what data is destroyed prior to the move. Additionally,

organizations must ensure the security of sensitive data throughout the migration process and in the target system.

Focus on the End User

In the end, the success of any technology deployment depends on how the end users respond to the technology and to the migration process itself. For instance, if users cannot quickly find necessary data or easily use new features, they will resist implementing the technology. Likewise, if the migration process significantly interrupts workflows, users will complain.

By planning the migration with the end user in mind, organizations can prepare effectively for interruptions and challenges. When users know ahead of time what to expect, they will adjust more quickly. And when the project plan provides for proper end user training, users adopt the system with greater ease.

Migrate with Confidence

With careful planning and the right tools, Microsoft 365 migration can proceed with minimal work disruption. Using proven tools and processes, the migration experts at Messaging Architects have helped hundreds of customers migrate successfully. Contact them today to start the planning process.