

# 7 Microsoft 365 Migration Tips to Ensure a Smooth Migration



Microsoft 365 delivers significant benefits for organizations and end users alike, from powering mobile work to driving [real-time collaboration](#). While moving to Microsoft 365 requires careful [migration planning](#), the process provides a unique opportunity to adjust data organization and tighten security. These Microsoft 365 migration tips can help.

## 1. Commit to a Thorough Discovery Process

Nothing will affect the success of your Microsoft 365 migration project quite as much as the quality of the initial discovery process. A robust discovery starts with identifying the data in the existing environment, including the amount and types of data to transfer. Look carefully at mailboxes, team structures and document libraries.

Additionally, note any situations that might require special handling, such as unusually large inboxes or particularly sensitive data. Beyond the data itself, make note of workflows and business processes, permissions, users and licenses, distribution groups, security settings and more.

## 2. Map Out the Destination Environment

To ensure a smooth migration process, take time to prepare the new environment before transferring any data. Meet with key stakeholders and team leaders to ensure the new structure supports business processes. For [Microsoft Teams](#), map out how the teams will operate and resolve any duplicate team names ahead of time.



### 3. Clean Before Moving

Migration presents the perfect time to clean up bloated email inboxes and document libraries, keeping regulatory compliance in mind. Delete or archive inactive mailboxes and teams that no longer serve a purpose. Likewise, look for duplicate or outdated documents. Reducing unnecessary data will help streamline the migration process, saving time and money.

### 4. Perform a Test Run

Conduct a pilot project on an average size team to iron out any kinks in the migration plan. A carefully monitored test run allows the migration team to identify and address issues that may arise. For instance, the pilot process may highlight the need for additional team members or more training.

### 5. Develop a Clear Plan of Action for Addressing Issues

Even a well-planned migration will encounter difficulties. And when the migration involves software so integral to daily work, small issues can have a significant ripple effect. How the migration team handles problems will go a long way toward determining end user attitude.

When problems arise, take time to assess the situation before communicating a plan of attack. Instead of responding immediately with a guess that may well prove incorrect, take half an hour to discover the actual issue. Then you can more clearly communicate the problem and expectations for the solution.

## 6. Communicate Throughout the Process

From beginning to end of the migration process, communicate clearly with migration team members, key stakeholders and end users. When everyone affected knows what to expect, they can adapt quickly and will adopt new functionality more readily.



Use multiple communication approaches to ensure everyone gets the message. For example, supplement update emails with mini town hall meetings or announcement banners. And be sure to provide adequate training on changes and new features.

## 7. Assess and Upgrade Security as Necessary

Because end users already expect change, the migration process presents an ideal time to take an assessment and [adjust data security](#). For instance, this may be the perfect chance to implement email encryption or multi-factor authentication. Additionally, as you map out the destination environment, take the opportunity to upgrade access controls.

## Implement Microsoft 365 Migration Tips with Expert Help

The [Microsoft 365 migration experts](#) at Messaging Architects have guided hundreds of organizations through successful migration projects. With proven tools and extensive expertise, they will deliver a solution optimized to reduce the impact on your organization.