

How to Prepare for Microsoft 365 Migration Success



You know the [benefits of a Microsoft 365 migration](#). You probably also know that migrating to Microsoft 365, no matter what platform you migrate from, brings challenges. But when organizations take the time to plan and prepare for Microsoft 365 Migration, and when they use the right tools, the process can go smoothly.

First, take time to figure out the scope of the project. Ask the right questions and involve the right people. This will help you in [choosing the best migration tool](#) for the job. Then, take the time to clean up the old environment and set up the new one before moving any data. Finally, run a pilot migration to iron out any kinks.

Identify the Scope of the Project

Before you can begin planning a migration, you need to understand your current environment. This includes knowing what data needs to be migrated and where it lives. And it entails gathering stakeholders from each business unit to help you identify workflows, prioritize projects, and highlight potential issues.

Consider additional factors such as customizations, key functionality that users depend on and security and compliance concerns to address. As you gather this information, you can begin building a picture of how much data needs to be migrated, how long the process will take and how it will impact end users.

Determine the Necessary Microsoft Licenses and Subscriptions

Microsoft 365 comes in various flavors, with plans for small to medium businesses and enterprise plans. Each package offers a different combination of features and [choosing the right package](#) for your business needs can prove challenging. For instance, if you want advanced [information governance](#) and [data security features](#), you will need to purchase the right plan.



In addition to determining the appropriate Microsoft plan, you also need to figure out the necessary number of licenses. Essentially, each mailbox needs a license, so now is a good time to archive unused mailboxes. Also, depending on the apps and services they need, not all users need the same subscriptions.

A Microsoft partner such as Messaging Architects can help you identify the right combination of subscriptions. In many cases, they can also offer flexible payment, support, and reporting options not available when you purchase directly through Microsoft.

Choose the Right Migration Tool

Organizations [migrating to Microsoft 365](#) have a couple of options. Microsoft does offer a native migration tool which can work for small, basic migration projects. However, for a more complex migration, most companies find that a [third-party migration solution](#) will deliver a better result.

As you determine whether to try a DIY migration or engage a migration expert, consider how much data you need to migrate, the complexity of the environment and how much downtime you can afford if the migration hits snags.

If you choose to partner with a migration expert, choose a vendor that can demonstrate a significant history of Microsoft 365 migration projects. The best partner will be one who brings both deep technical expertise and proven tools.

Prepare the Old Environment

Take time to clean and organize the current environment before you migrate. Delete or archive unused mailboxes and inactive databases, taking care to observe regulatory requirements. Also, remove redundant, obsolete, or trivial data (ROT). Migrating unnecessary data can significantly increase the time and cost to migrate.

Set Up the New Environment

Set up the Microsoft 365 environment before moving any data over. This will include tasks such as creating [Microsoft 365 groups](#) or teams and defining permissions. Migration also provides a great opportunity to assess security needs and take advantage of powerful Microsoft 365 solutions for authentication, encryption, and other security controls.



Run a Pilot Migration

Before proceeding with the full migration, conduct a pilot project using an average team. Monitor the pilot project carefully. This gives the migration team an opportunity to identify and fix any issues with the process.

Partner with Experts to Prepare for Microsoft 365 Migration

The migration experts at Messaging Architects have a long history of [successful Microsoft 365 migrations](#). Whether you are migrating from [Exchange](#), [GroupWise](#), or another platform, they have the tools and expertise you need for a smooth transition.

With over 30 years of migration experience, Messaging Architects will proactively address any compliance issues before, during and after the migration. And as a Microsoft partner, they will help you choose and configure the right solution and prepare for Microsoft 365 migration success.