Increase Ongoing Productivity with a Successful Microsoft 365 Migration

Whether migrating from on premises to the cloud or merging two Microsoft 365 environments, the migration process presents both challenges and opportunity. A poorly planned migration can result in major work disruptions and even data loss. But a successful Microsoft 365 migration presents the perfect time to jump start information governance.

The following migration tips will help to ensure that the migration process runs smoothly. At the same time, they prime the organization to move forward with increased productivity and security.

Restructure for Optimal Productivity

Advances in technology, regulatory changes and evolving business needs mean that the data environment requires regular adjustments. For instance, as teams change and projects end, existing filing structures may no longer make sense.

Before commencing a migration, take time to assess your current environment and take stock of business goals. Finding the answers to key questions will highlight opportunities to improve processes and filing structure moving forward. For instance, has the current filing structure become more layered than necessary? Can users quickly find the files they need?

Essential information may be buried in a complex hierarchy of folders that no longer make sense. Consider moving, instead, to a reliance on metadata and data classification. For instance, descriptive document tags make information searchable even if it lives in an obscure folder.

Rebuilding the old structure in the new environment might not make sense. For example, some groups no longer have a purpose or owner and should be deleted. Others should be merged to streamline work processes. Outdated information should be archived or purged, as regulations allow.

Plan for Post-Migration Information Governance and Security

Avoid carrying data sprawl and insufficient security and regulatory compliance controls into the new system. Spending the time to review and update information governance policies prior to migration will make things easier down the road. Because users already expect change, the organization can start fresh in the new environment.

Policies to address include email and retention policies, naming conventions for groups and folders, MFA, encryption, restrictions on external sharing and more. For instance, automating retention and destruction policies will help reduce sprawl and improve regulatory compliance.

Migration also provides the perfect opportunity to review permissions and adjust as necessary. Define permissions in the new system before moving data over. Some permissions will transfer easily, while others will require some decision making. Tools such as Microsoft Entra simplify identity governance while supporting zero trust strategies.

Consider a Phased Migration

Organizations have several options for migrating to a new Microsoft 365 system. Conducting a migration in multiple phases may bring important benefits. In the first place, migrating a pilot group first allows the migration team to test the migration process and iron out any issues. In fact, a successful migration may require multiple pilots.

Secondly, some data types or departments will likely take priority over others. After each migration phase, check to make sure that all data migrated correctly. Additionally, some data sets should move directly to the archive instead of transferring to the active Microsoft 365 system.

Focus on the End User

Throughout the migration process, keep the end users in mind, because they play a significant role in the success of the migration. Communicate early and often. Make sure users know the timeline and changes to expect. They should also know how to report any issues they encounter in the new system.

Most importantly, make sure that users get the training they need so that they can jump right into the new system without losing productivity. They will need to know how to find the information they need and how to use new features. They will also need to understand their role in any changes to security and information governance strategies.

Effective end-user training will involve interactive examples and instruction specifically targeted to the users' roles. Repeated instruction combined with visual reminders will help cement important practices.

Choose the Right Partner for a Successful Microsoft 365 Migration

Migrating to Microsoft 365 involves significant complexity. To minimize the potential for costly issues while maximizing the strategic opportunities, leverage the tools and experience available from a Microsoft partner. The migration consultants at Messaging Architects offer powerful tools and expertise to take the pain out of complex migrations.