



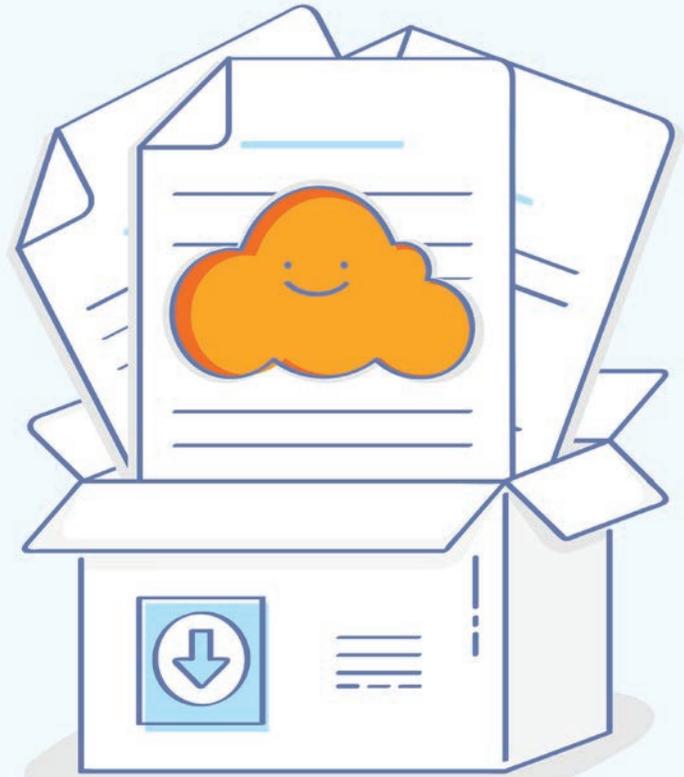
# 5 Pitfalls to avoid on your first Microsoft 365 migration

So, you're joining the club. You're going "all in" (with Microsoft) like so many others have done to date. You're excited, you know the benefits, you can picture the streamlined future, but like all upgrades and migrations, you're wondering just what might go wrong and what are the key things you need to prepare for on your first Microsoft 365 migration.

Now, of course, there's a number of things you need to think about and there are so many apps you could be using, so make sure you talk to people who can best align your goals to their past experiences.

Before you perform the migration, you need to understand what pitfalls to navigate. Here's our list of **five big mistakes to avoid on your first Microsoft 365 migration**.





# #1

## OneDrive First – Really?

The easiest action shouldn't always be the first. It seems logical to think 'hey, file migrations of home drives, and My Documents on PC's to OneDrive is easy – let's knock that off first!'

And you're right it is easy. You don't need to worry about information architectures. It's generally not governed content, there's no metadata and taxonomies to plan, and with a terabyte of storage per user it's unlikely you need to worry about any pre-migration cleanups. What could go wrong, right?

Well, plenty is the answer. While people can be change resistant, many still love to play with shiny new things and Microsoft have evolved OneDrive into a terrific tool. But if rolled out prior to organizational document libraries in SharePoint, it can create bad behaviors that require a lot of interaction and monitoring to ensure your information management doesn't get out of control.

OneDrive is a great spot for personal files, it's neat to use, you can access it from the Web, you can share files with others, and you can even sync it to good old Windows File Explorer that users know so well and love.

But OneDrive is not a team share because its identity is an individual's identity. So it doesn't allow others to navigate and easily know where team content is. Hence the challenge can come from people getting excited about this new tool, (the versioning history, the easy sharing, the mobile app, etc.) and they start storing team and company-wide related content into their OneDrive.

This generally happens when you haven't yet given them the alternative like SharePoint Document Libraries (or Teams, Outlook Groups or SharePoint Team Sites). Before you know it, you have some of your corporate or team content in your File Shares or some in people's OneDrive's. Now you have to work out how you can consolidate that into your new team or company document hubs in Microsoft 365, as well as breaking bad information storage behaviors that are already creeping in.

The other challenge can be the Offline Sync to the PC from OneDrive. We discourage this other than for users who don't have easy and continuous access to the web (airline travelers, etc.). Deploying OneDrive first can often inhibit your intended change program as people love to work like they used to. Given the File Explorer sync with OneDrive, they will generally continue to work out of their File Explorer interface. When they do this, they lose the benefits that moving to OneDrive (and SharePoint Libraries) provide, such as version history visibility, document preview, options for Word Online vs the desktop client (metadata filtering that you would deploy with SharePoint Libraries and much more). Accessing files through the "comfortable, tried and tested" File Explorer also prevents users getting the familiarity of the Microsoft 365 interface that will help them explore tools like Delve, link them to any Outlook groups, and consider how things like Planner might help them and their colleagues get things done.

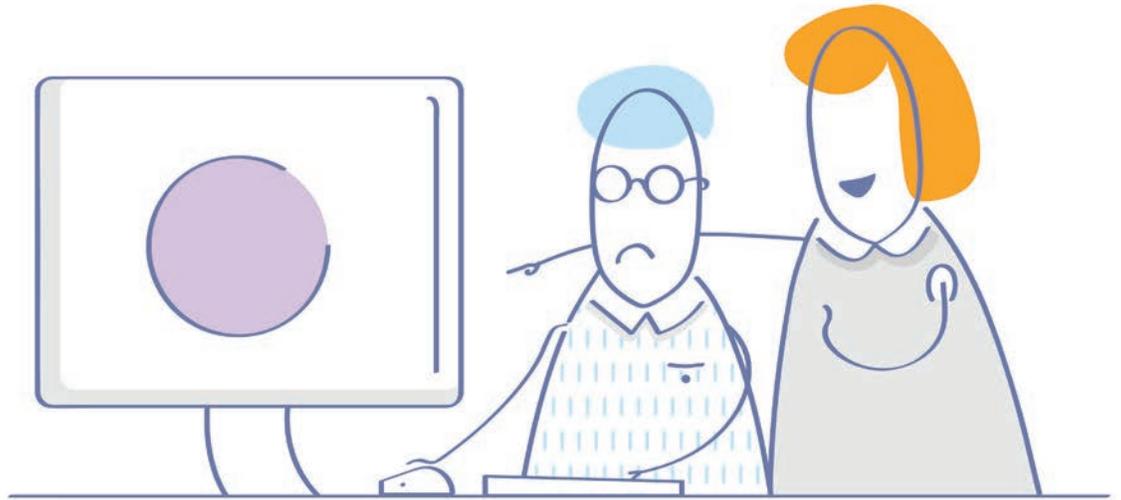
So you don't want their first interactions with Microsoft 365 to be Windows File Explorer. They will never leave it!

### OUR RECOMMENDATION?

Migrate your file shares first, provide them access to these files via web-accessible SharePoint libraries and let them see how metadata (document tags or classifications) can help them find content, have them be comfortable working this way; then open up OneDrive and Sync things locally if needed.

Your content will more than likely stay in the right places, your users will be used to Microsoft 365 capabilities and the old trusty (but very limited) File Explorer will only be used for certain needed offline content and File Explorer won't become a demand for all library syncs, nor a change inhibitor.





## #2

# Collaboration will ruin everything; we need strict governance – Ah, maybe.

It's easy to forget that we're not just performing some type of technical upgrade; and that change is not just about training users in a new tool. Many of us are moving to a completely new type of working platform, so it's important that be approached with a new way of thinking about how we encourage and let users work.

Generally speaking, most organization's (moving to Microsoft 365) old system of collaboration include file shares, email and perhaps Intranet team sites. For many, these can be tightly governed systems and it's easy for organizations to gravitate to a strict governance desire across all things in Microsoft 365.

First and foremost, governance is extremely important and its links to delivering good security and compliance are vital. But with new ways to work, it's also important that we don't completely remove the collaboration and productivity benefits that Microsoft's new apps in Office 365 provide us.

The answer to achieving both is better understanding what tools in Microsoft 365 are easier to govern and what tools lend themselves most to rapid and effective collaboration.

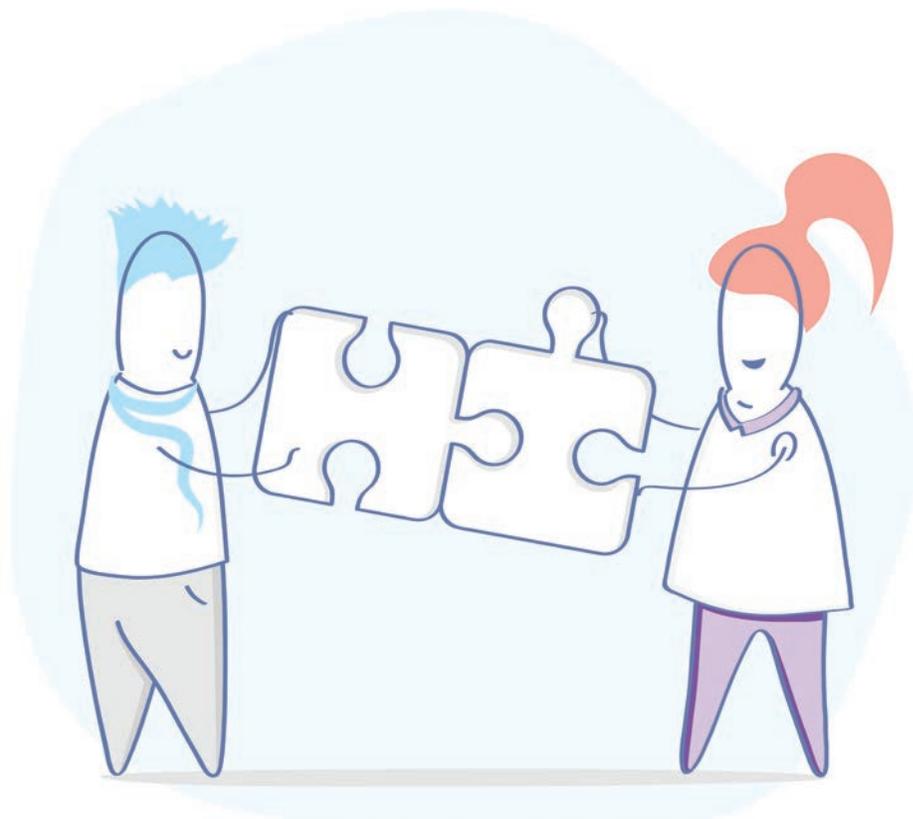
Every organization will map their own path to finding the sweet spot that suits their industry, their culture, and their compliance regulations best; but we have certainly seen much success with working with organizations where:

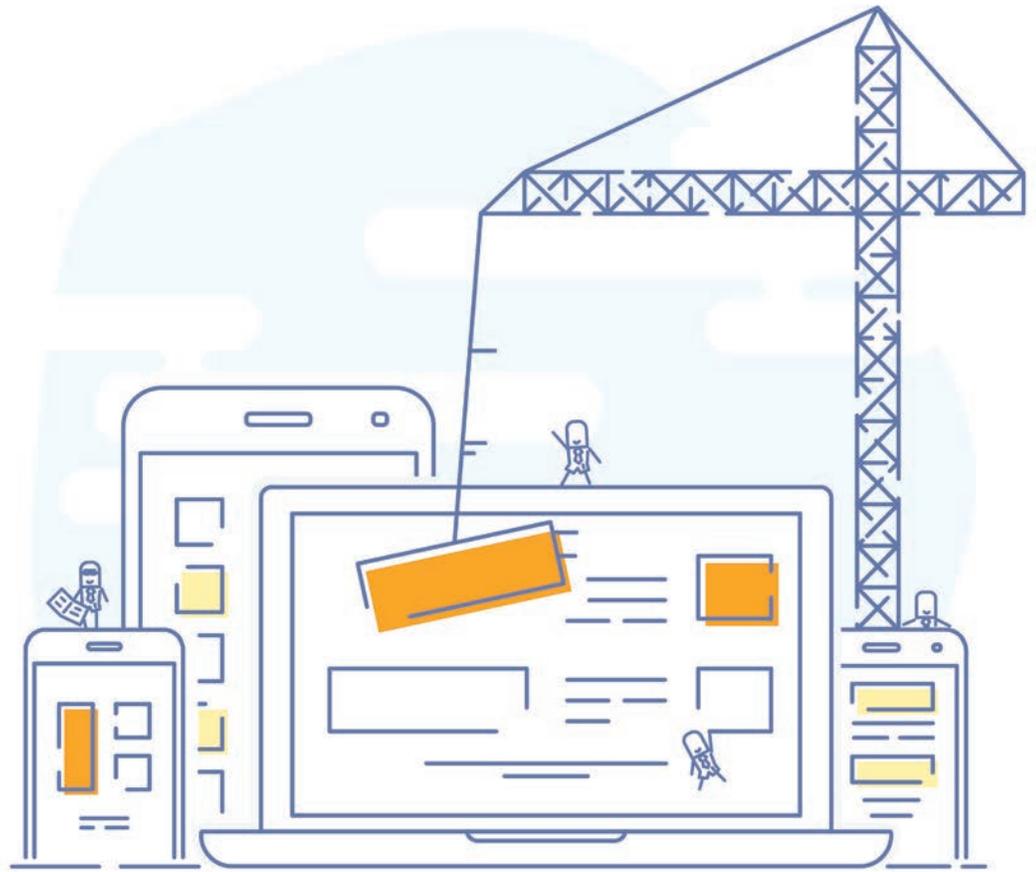
1. The Intranet and SharePoint sites (in Microsoft 365) are focused on governed content with metadata, strict permissions, workflow, retention policies, etc. are applied to meet governance and compliance goals. This content could relate to Policies and Procedures, Quality Documents, Client Data, Public Data and more.

2. Apps like Microsoft Teams are free flowing for users to build up draft content, unstructured data, and preparation materials around non-regulated data and initiatives. Some examples could include content and activities relating to marketing and event planning, internal workshops and business innovation ideas, meeting planning, idea sharing and more.

Many organizations are still grappling with the concept of Teams and fearful of them spreading like wildfire. However, if framed the right way in your organization (and other areas configured for governed content), we would recommend embracing the opportunity to let people be productive, collaborate and innovate how they come together to get things done.

This may not be possible for every industry or organization, but take the time to consider how you can think differently with the range of governance and compliance features and functions available to you across a myriad of apps in Microsoft 365.





## #3

# Change just happens with the right training, doesn't it?

Management teams often measure a project's success by its delivery within time and budget constraints. However, if the people side of the project isn't handled properly, the true benefits that can come from a project are generally not realized. and hindsight will prove the project has failed.

Success planning isn't just a 1-hour training session for everyone. Success planning, should be treated as a core element of any project and appropriate resourcing and budget allocated. The more effort you put in, the more successful the project will be.

Planning for Success is all about gaining an understanding of the project, the organization and people. What are you doing? Why are you doing it? Who is it going to affect? Is there a lot going on that might cause a level of change saturation that could hurt the project? What are the technical and non-technical barriers? Are your communications matching the reality of what will be delivered? Establishment of plans to help with communications, training, sponsorship modelling, coaching and resistance management are vital to overcoming many of these hurdles.



### MANAGING SUCCESS:

You need to take your users on a journey. Awareness needs to be raised and the desire to succeed needs to be established. They need to know and be confident in working with what you are giving them. You also need to be sure that this is reinforced with users and organizational leaders to give the project the best possible chance of being truly successful.

Reinforcement is achieved through the collection of feedback and usage metrics to showcase the achievements made and how those old pain points you were experiencing are a thing of the past. Celebrating those wins help to gain the credibility needed for future projects, and it further reinforces that the project has been a success and they (all staff) are better off.





## #4

# Review your Active Directory structure

Another potential issue right out of the blocks is your old ageing Active Directory structure. When was the last time you did a clean-up of AD removing old employees and conducting a general security model review?

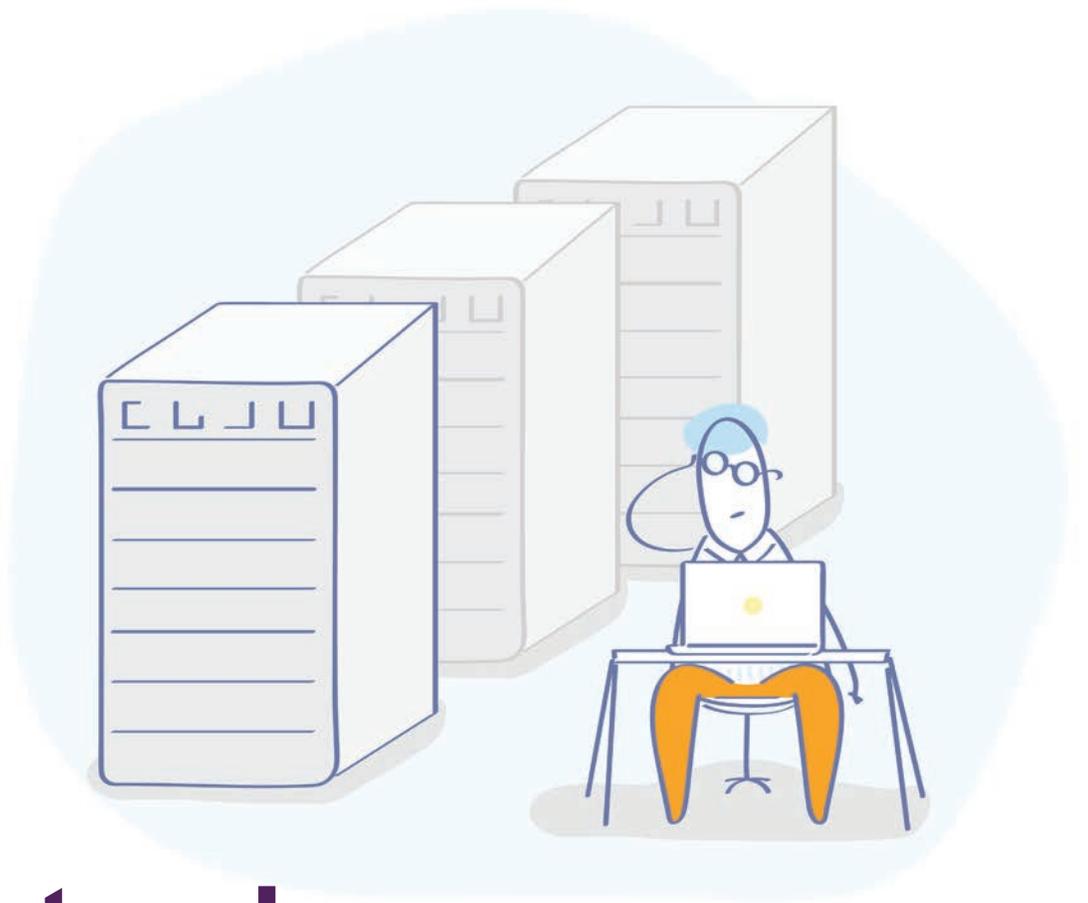
Invalid characters, invalid UPNs, multiple entries and incomplete or corrupt AD attributes are common issues that can prevent your user identities synchronizing with the cloud.

You also need to revise your group policies and security groups to make sure they're "cloud ready" – that is – the right level of control and security is in place.

You also need to decide on an authentication model. Are you going to use cloud identities, synchronized identities, or federated identities that integrate seamlessly with on-premise user logins?

There are a number of pre-requisite patches and system requirements for integrating AD with Microsoft 365 when choosing synchronized or federated identities. The last thing you want is kicking off a migration and getting stuck between a rock and a hard place.

We've seen customers try migration without the proper AD preparation and losing access to email for a while cleaning up and reversing out the changes of a failed migration. Start at the foundations and all should go well.



## #5

# Understand your backup needs and Microsoft 365 backup capability

Microsoft 365 has Data Centers in Sydney and Melbourne and has replication between for Disaster Recovery purposes. It has recycle bins and it has retention policies in both Exchange Online and SharePoint Online. But you need to know your data recovery requirements and backup management plan to ensure you are adequately protected in line with your recovery needs.

Take some time to understand what users can delete in Microsoft 365, how they can get data back (self-service style), what and how administrators can assist with (in relation to data recovery) and what the out of the box retention policies provide in relation to recovery time-lines.

In our experience, organizations can often identify recovery gaps and require adjustments to out of the box configurations and or third party solutions.



Run scenarios such as “what happens if an email or a file is deleted, and we need to recover it from two years ago?” “Can we always predict what we will need to recover ahead of time?” If so, you may be able to rely on retention policies, records, or legal hold configurations. If not, you will likely need to invest in a backup solution that provides the required level of retention and protection.

There would be nothing worse than moving to Microsoft 365, exposing the organization to data loss that wouldn't have been likely in your old on-premise solution. This is a career limiting move for any IT professional.

# Get on the right track with your Microsoft 365 migration plan

Do you need expert guidance to assist you in your first Microsoft 365 migration plan? We have a team of dedicated consultants, solution architects and advisors to help you stay on the right path to migrating to Microsoft 365. Call us at 1800 126 499 to learn how we can assist you.

# For more information

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## About Us

Professional Advantage was established in 1989 in Sydney Australia and has grown rapidly over the years across the globe. We currently have 7 offices that range world-wide, and established a North American presence in 1996, including two branches here in the US (Denver & Fargo).

Professional Advantage has been a Microsoft Presidents Club Member and Certified Partner for several years, providing offerings and products in both the Microsoft Dynamics 365 and Dynamics GP space. With 6,000 customers globally, the focus has always been helping clients use the technology to make a difference and enable high performing workplaces.

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