# PLAN FOR A SUCCESSFUL MIGRATION INTO MICROSOFT 365

# Agenda

- Introductions
- Series Recap
- Migration Process
- Change Management and Adoption
- Questions / Next Steps

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# Peter Carson



- President, Envision IT
- Office Apps and Services MVP
- peter@envisionit.com
- blog.petercarson.ca
- www.envisionit.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group

# Eric Riz



- Principal Consultant, Envision IT
- 6X Office Apps and Services MVP
- 20+ Years experience in SharePoint
- Speaker and Author
- Thought-leader in the areas of strategy and governance
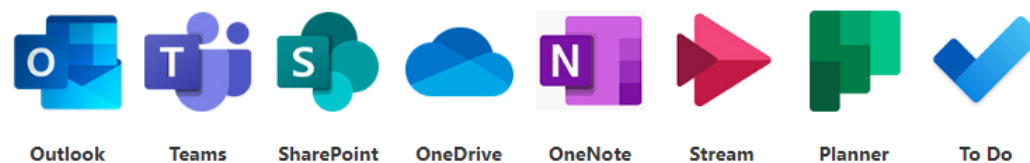- Passion for MS Teams use
- @RizInsights

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# Maturity Principles

- There are 5 stages to the Envision IT Microsoft 365 Maturity Model:

  - Optimized (highest)
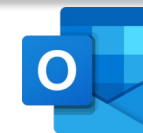  - Proactive
  - Consistent
  - Ad Hoc
  - Informal (lowest)

# What to Use When?

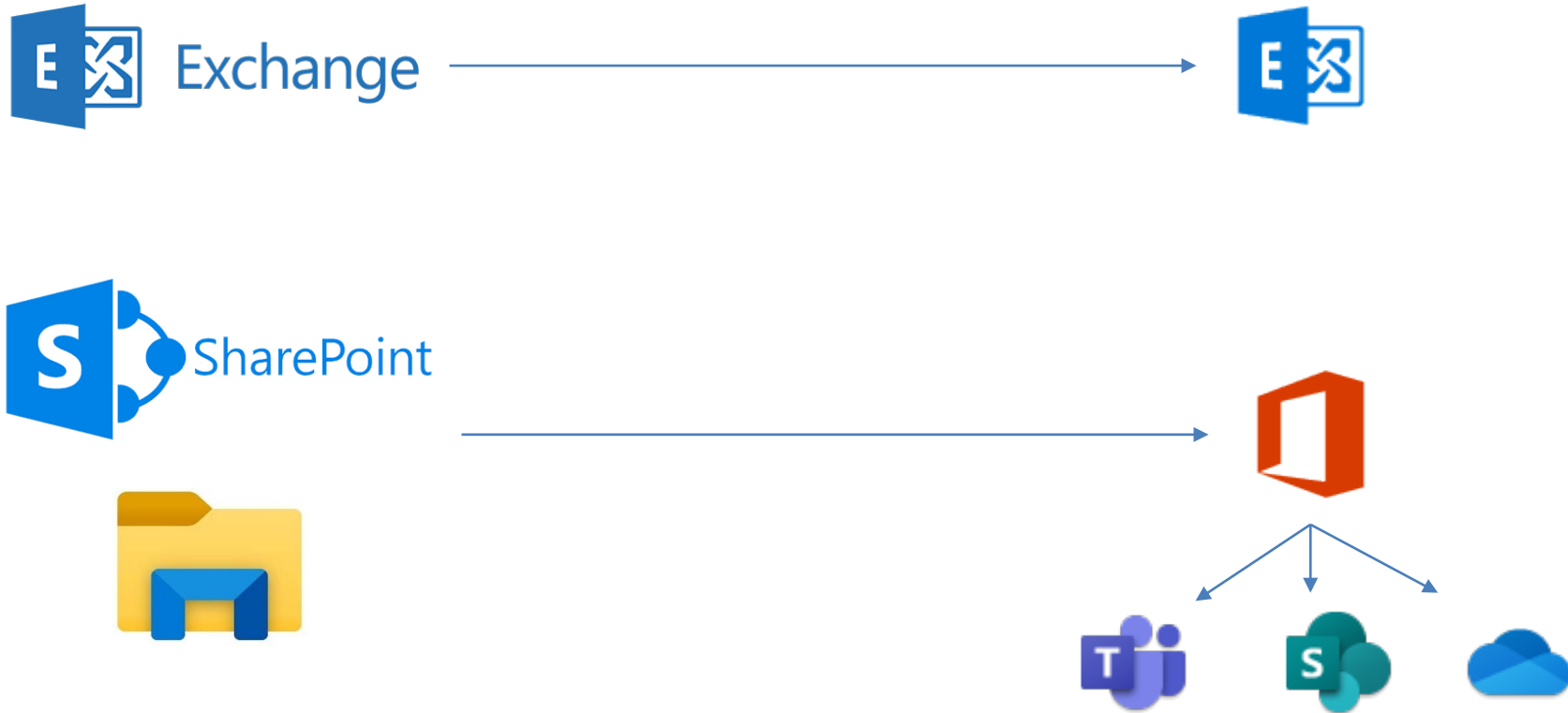| | Outlook | Teams | SharePoint | OneDrive | OneNote | Stream | Planner | To Do |
|---|---|---|---|---|---|---|---|---|
| Send and receive information | * | * | | | | | | |
| Chat with others | | * | | | | | | |
| Store my files | | * | * | * | | | | |
| Store team files | | * | * | * | | | | |
| Capture best practices | | | * | | * | | | |
| Manage my tasks | * | | | | | | * | * |
| Manage team tasks | | | | | | | * | * |
| Manage my time | * | * | | | | | | |
| Organize workspaces | | * | | | | | | |
| Develop documents | | | * | * | * | | | |
| Participate in online meetings | | * | | | | | | |
| Share screen / present information | | * | | | | | | |
| Record meetings | | * | | | | * | | |
| Share videos | | | | | | * | | |

# Microsoft 365 Maturity

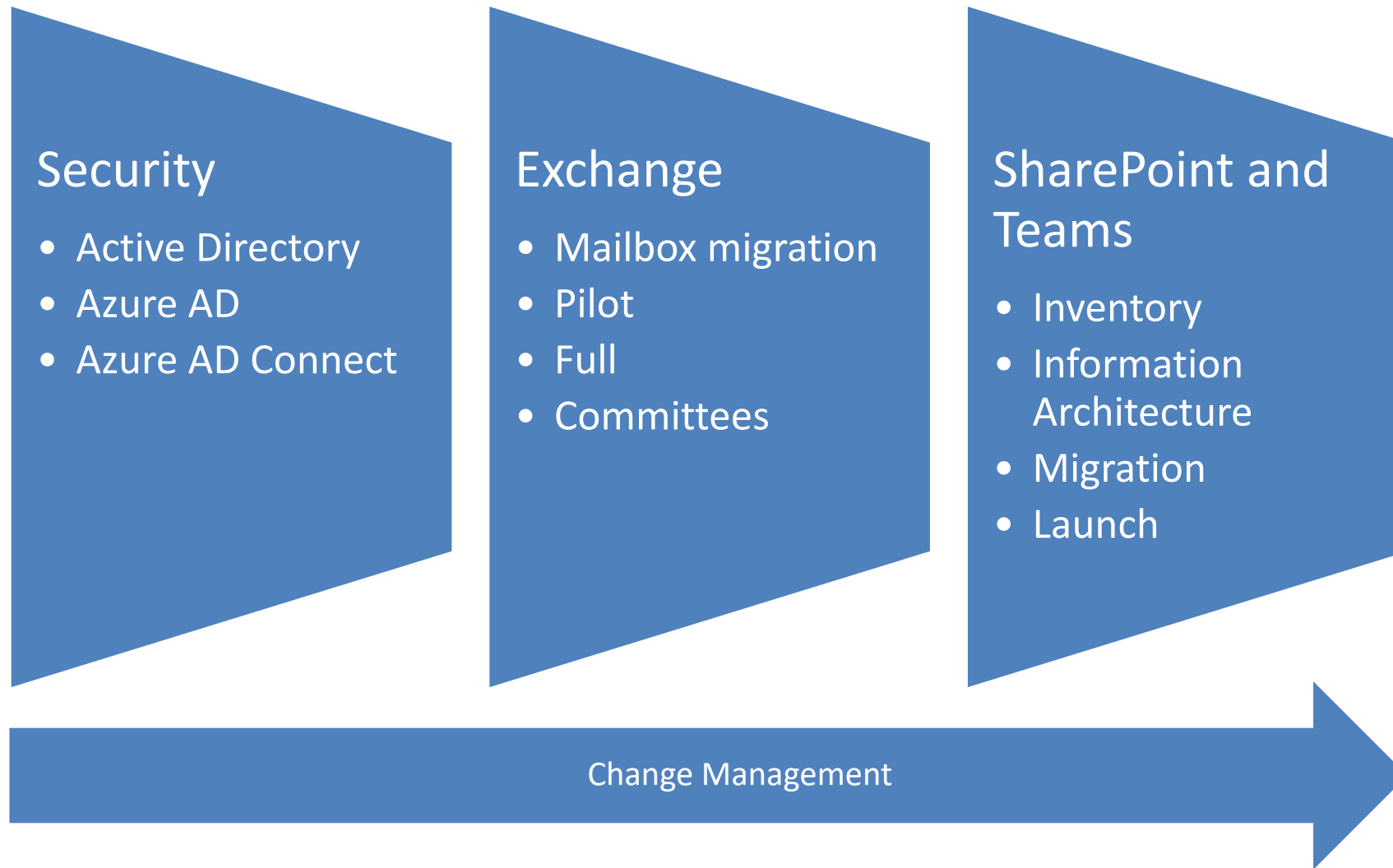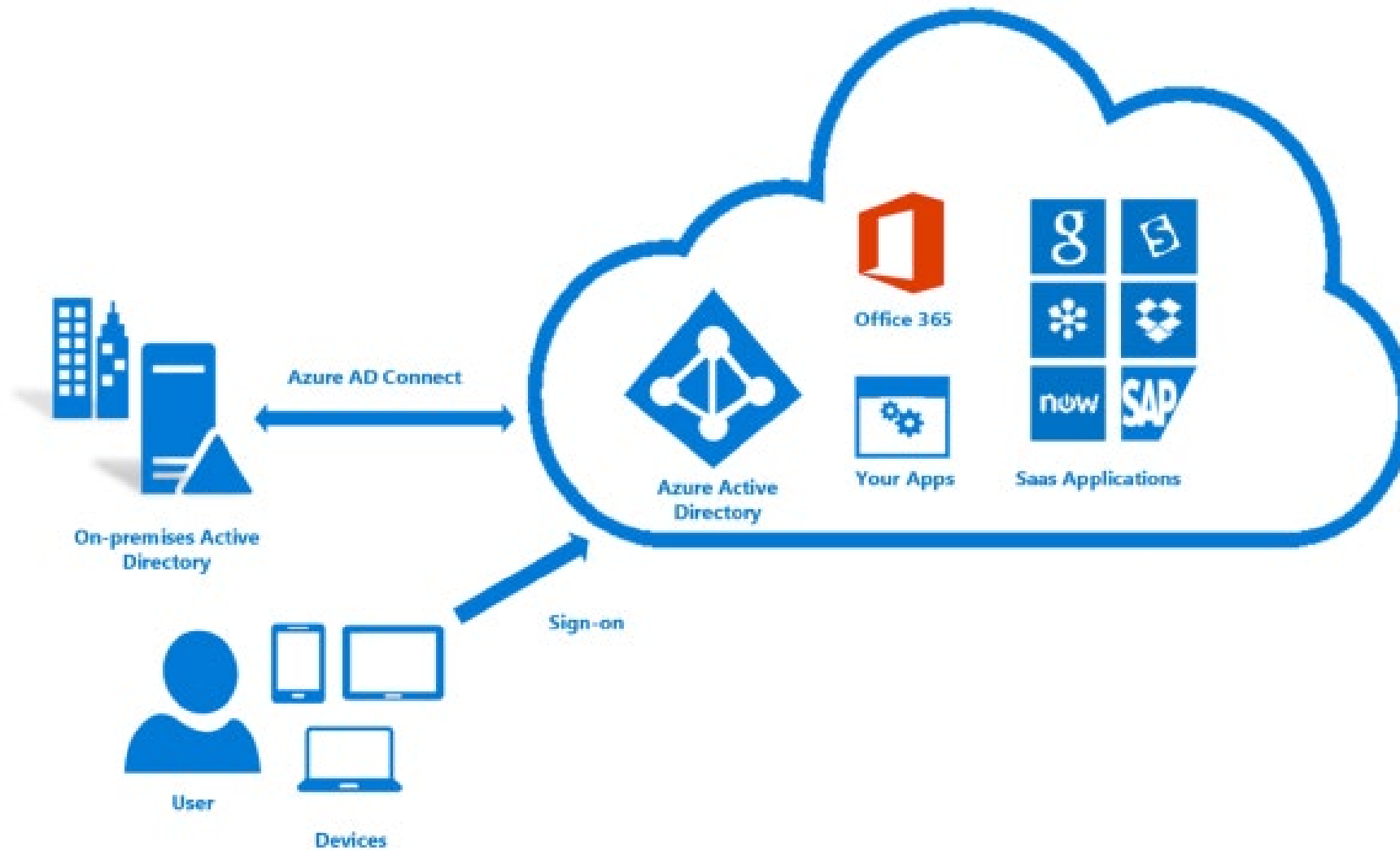| Level | Teams | Stream | SharePoint | OneDrive | OneNote | Outlook |
|-------|-------|--------|------------|----------|---------|---------|
| Optimized | Business transformation and process development; usage of >95% | All meetings are recorded and processed; policies exist to record based on retention and regulatory needs | External data is leveraged; multiple systems are integrated with SharePoint; usage >85% | All files and workloads are synchronized (local files do note exist) and integrated features are leveraged; usage >85% | All information and notes are stored in a corresponding OneNote and shared across the organization | Email outside the organization; all integrated features across M365 are leveraged (ribbon) |
| Proactive | Integrated Teams dependency across the organization; usage >90% | All meetings are recorded and recordings are distributed to content websites | Processes, forms and surveys are commonly used, reports are aggregated; usage >70% | Links are commonly used to share content, usage continues to increase >60% | OneNote files are shared via  and from Teams throughout the organization | Internal email use decreases; information is increasingly shared between M365 apps with usage <75% |
| Consistent | Deployment across the organization; usage of >75% | >75% of meetings are recorded and made available after the call | SharePoint is the standard for information management and workloads; usage <50% | Users store their data in and via OneDrive; data is synchronized; usage >50% | Notebooks are shared; cross app functionality is used, standardization begins to occur | Client-side email rules and tags exist for individuals and businesses, folders are used and prioritized |
| Ad-Hoc | Cross-departmental usage; >40% of users are online with Teams | <50% of meetings are recorded | Information is shared within departments, links to content is common; usage >20% | Users store content infrequently unless prompted by M365 Apps | Structured note-taking across a business unit; categories and tabs are used in a formal way | Email is predictive as Teams use increases; ribbon functionality is >25% usage |
| Informal | General functional use in a single department (minimum) | Meetings are rarely recorded; Stream is not used | SharePoint is used for document storage and general information is posted to portals | Files are stored and synchronized in OneDrive without user knowledge | General usage for note-taking in user communities; quick notes are used | Basic use; email sent and received |

# Project Overview

# Project Overview

## Security

- Active Directory
- Azure AD
- Azure AD Connect

## Exchange

- Mailbox migration
- Pilot
- Full
- Committees

## SharePoint and Teams

- Inventory
- Information Architecture
- Migration
- Launch

Change Management

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# Security, Authentication, and Authorization

# Azure AD Connect

# >1.2ᴍ

## compromised accounts in January 2020

# >99.9%

compromised accounts did not have MFA

Microsoft

# 67%

Reduction in compromises in tenants who disable legacy auth

# Office 365 Security Best Practices

1. Set up multi-factor authentication
2. Train your users (Educate)
3. Use dedicated admin accounts
4. Raise the level of protection against malware in mail
5. Protect Against Ransomware
6. Stop auto-forwarding for email
7. Use Office Message Encryption
8. Protect your email from phishing attacks
9. Protect against malicious attachments and files with ATP Safe Attachments
10. Protect against phishing attacks with ATP Safe Links

https://docs.microsoft.com/en-us/office365/admin/security-and-compliance/secure-your-business-data?view=o365-worldwide

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# SharePoint Online Migration

# Process Overview

# Inventory



https://blog.petercarson.ca/posts/preparing-for-a-file-share-migration-to-sharepoint-with-power-bi
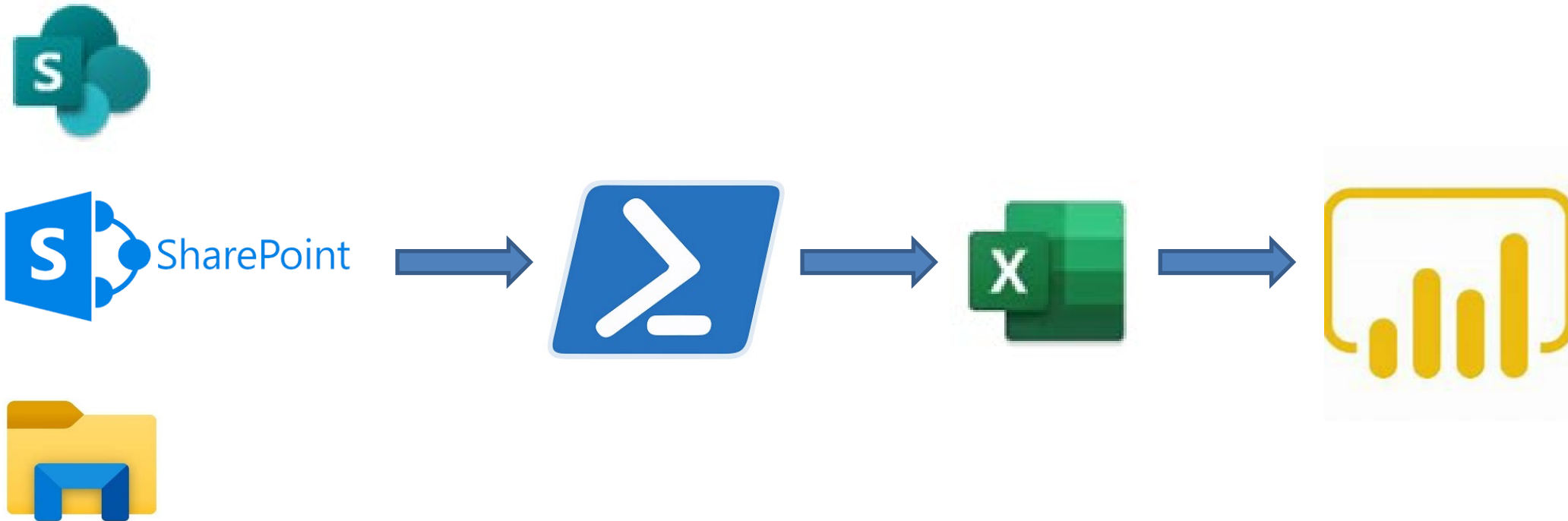
# Information Architecture

- Even with a good plan, information architecture is a continual process
- No more site/sub-site – new flat structure where all sites are site collections
  - Modern subsites are now supported
- Hub Sites create a group of sites that share navigation, branding and other elements
- Teams tends to drive the IA discussion

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# Three Places to Work

Chat **Microsoft Teams** Channel Conversations

**SharePoint**

## OneDrive for Business

## Team sites

## Communication sites
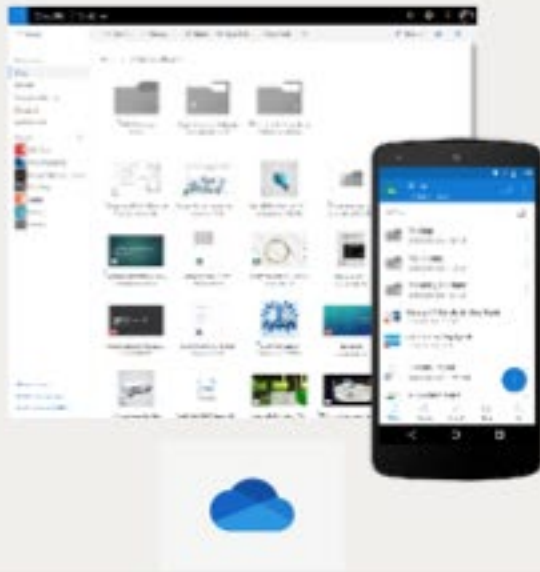
Private by default

Share content with your group
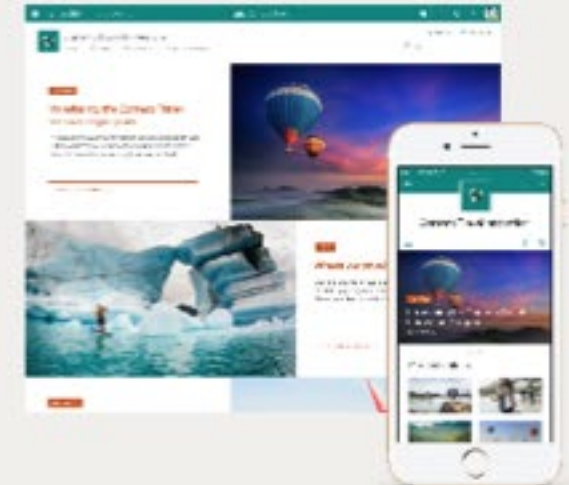
Inform and engage a broader audience

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# Classic vs. Modern IA



Root Site Collection
- HR
  - Subsite 1
    - Sub-Sub Site
  - Subsite 2
  - Subsite 3
- Communications
  - Subsite 1
  - Subsite 2
  - Subsite 3
- Marketing
  - Subsite 1
  - Subsite 2
  - Subsite 3
- Sales
  - Subsite 1
  - Subsite 2
  - Subsite 3
- Operations
  - Subsite 1
  - Subsite 2
  - Subsite 3

SharePoint Online Tenant
- HR Hub Site
  - Site Collection 1
  - Site Collection 2
  - Site Collection 3
- Communications Hub Site
  - Site Collection 1
  - Site Collection 2
  - Site Collection 3
- Marketing Hub Site
  - Site Collection 1
  - Site Collection 2
  - Site Collection 3
- Sales Hub Site
  - Site Collection 1
  - Site Collection 2
  - Site Collection 3
- Operations Hub Site
  - Site Collection 1
  - Site Collection 2
  - Subsite 3

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# Teams First Information Architecture

- What does a Team represent?
- What does a Channel represent?

| Team | Channel |
|------|---------|
| Department | Sub-departments, projects, products, folders |
| Client | Project |
| Location | Project |
| Projects | |
| Initiatives | |

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# Folders, Document Sets, and Metadata

- Teams encourages folders
- Teams also now supports rich metadata and views
- Document sets can be used to simplify assigning metadata
- Additional metadata can be set at the document level
- Folders can still be used

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# Demo

# Teams Provisioning Implementation

# Teams / Site Provisioning

- White Papers
- Open Source project
- Webinars
- http://eum.co/teams-provisioning

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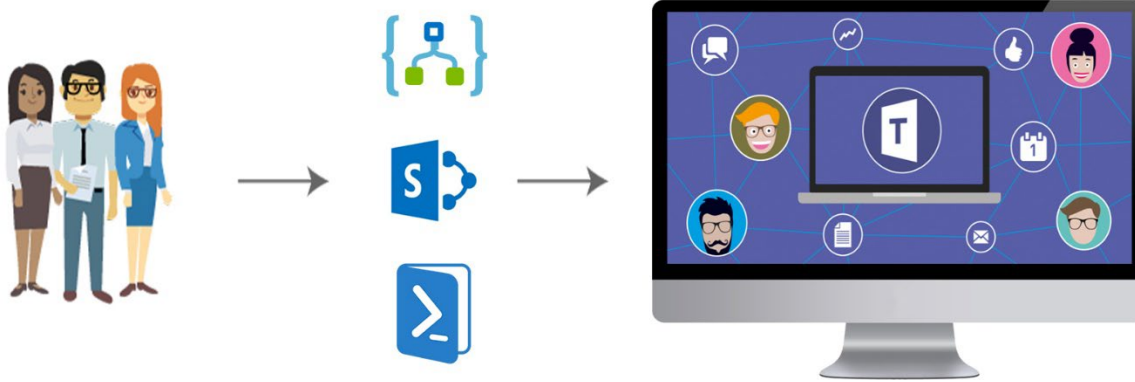
# Teams and Site Provisioning Process



Site Request

Division *
Leviathan Security Group

Site Template *
Client Site

Title *

Purpose

Alias *

Public Group
Yes

Create Team
Yes

Submit    Cancel

- Open Source Solution
- Effective governance to avoid site sprawl
- Intuitive form for creation of new Team site
- Logic App generates O365 Group
  - SharePoint Site including OneNote
  - Exchange calendar and mailbox
  - Microsoft Team
  - Optional Project (Channel)
- A-Z SPFx web part
- May be integrated with CRM

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# Teams First SharePoint Migration
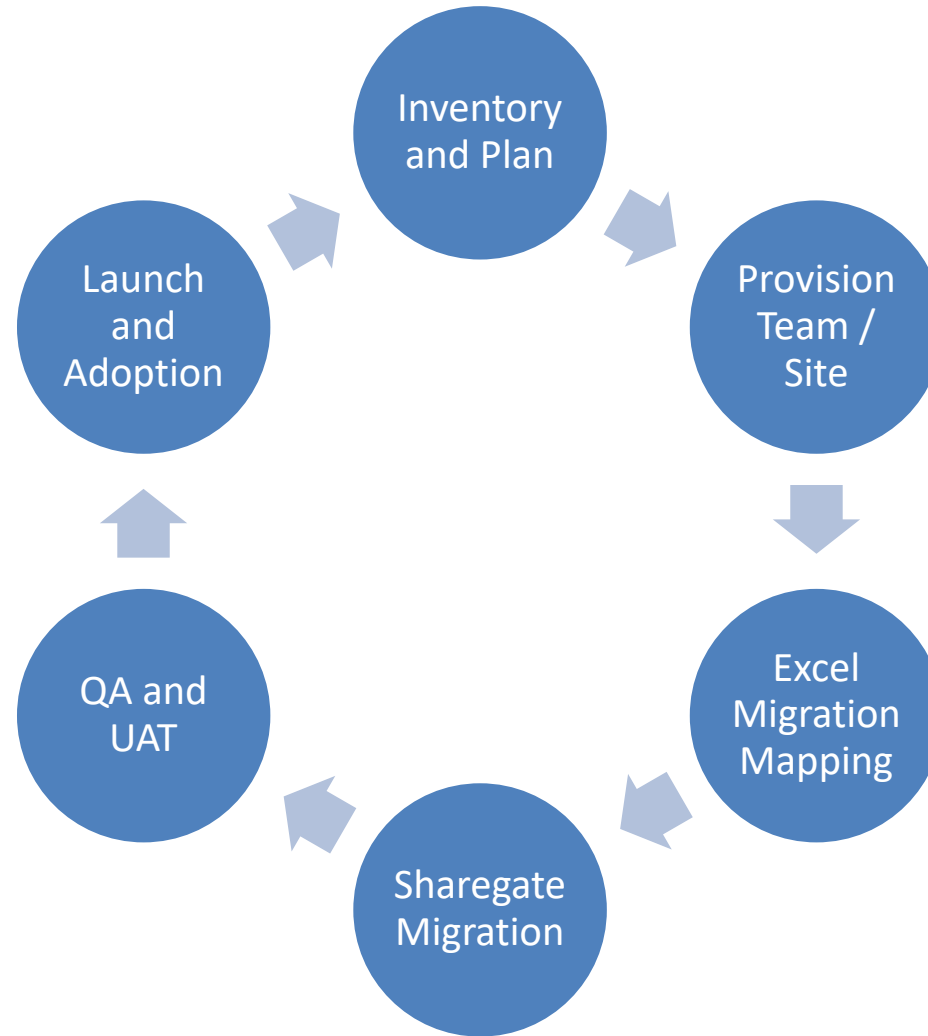
# SharePoint Online Migration

- Aligning information architecture from previous on premises site structure to Microsoft 365 structure is extremely important considering the presence of Teams and SharePoint Online modern site structure

- ShareGate will be used to manage the migration process

- Ideal time to evaluate all content and reorganize, update or prune as appropriate

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# Pre-Upgrade Assessment

## Steps

- Inventory your site content
- Run [SPDocKit](#) to inventory the farm infrastructure
- Review all custom and vendor solutions
- Consult with you to determine the best upgrade approach

## Deliverables

- Inventory of your site content:
  - Number of lists and libraries
  - Number of pages
  - Number of documents
  - Number of list items
- A detailed report of the farm configuration
- A recommended approach and estimated cost for migration or upgrade

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https://slideplayer.com/slide/13041452/
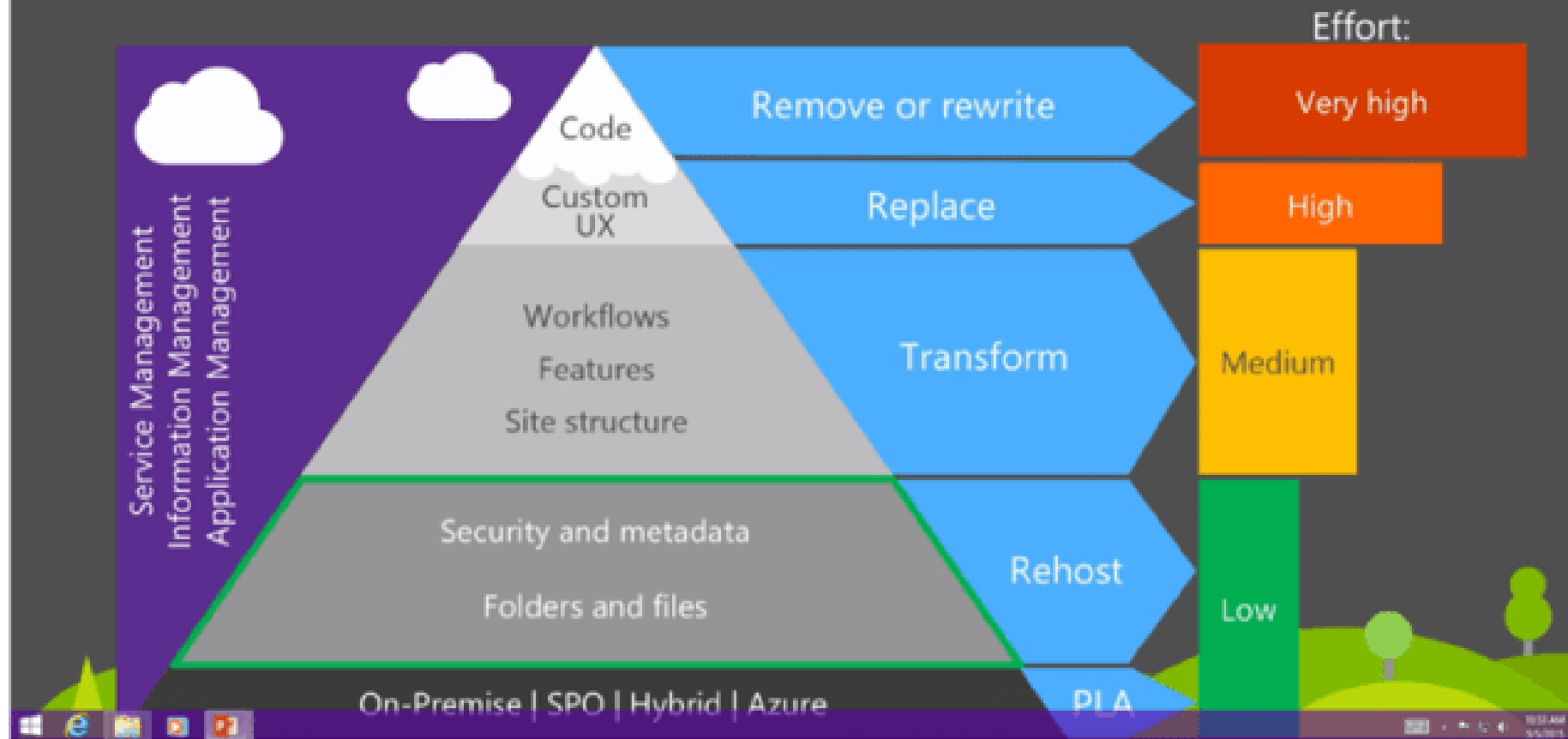
# Planning

- Generate reports on client environment to identify and mitigate any issues ahead of migration
- Powershell Inventory/ShareGate provide a number of valuable reports (see next slide) to assist with planning
- Conduct Migration POC to estimate time involved in migrating typical content
- Plan out migration timeline in coordination with client with prioritized migration of files/sites
- Assistance with Powershell scripting or usage of Import/Export Excel Sheets.

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# Migration Tools



https://en.share-gate.com/



https://docs.microsoft.com/en-us/sharepointmigration/introducing-the-sharepoint-migration-tool

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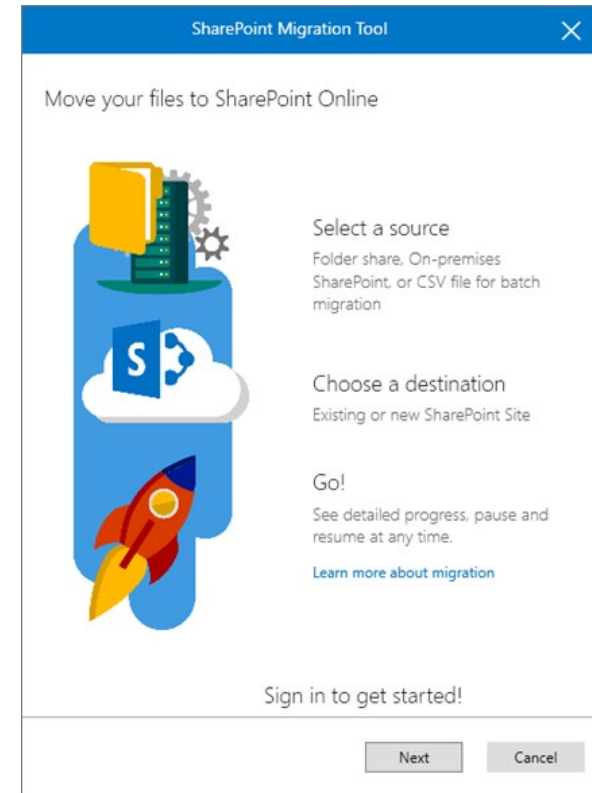
# Migration – Comprehensive Planning Reports (ShareGate)

| | | | |
|---|---|---|---|
| Site Collection Report | Permissions Matrix Report | Unused Site Report | Orphaned User Report |
| Audit Report | Checked out Documents Report | External User Report | Lists with Workflow Report |
| Site Report | Sites with Custom Permissions Report | External Sharing Report | Workflow Report |

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# Sharegate – Planning Reports

- ## Sharegate
  - ### Source Analysis
    - Number of Site Collections/Sites
    - Detailed info on List, Document Library, Site: size, last modified

# Sharegate – Planning Reports II

- Sharegate
  - Permissions Matrix Report – Detailed User & Group Access to Site Collections & Content
  - Report can be generated for specific users and Groups
  - Report can be generated for external users

# Sharegate - Planning Reports III

- Checked Out Files on a particular site collection or site

# Teams First SharePoint Migration

# Change Management
# and
# Adoption

# Change Management and Adoption



- Focus on departmental success
- Transition and transformation
- Piloting
- Target long term success through subject matter expertise

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# Envision IT's Microsoft 365 Maturity Model

# Microsoft Teams for US Government

# Day in the life – Program Management (PMO) Senior Program Manager

Meet Justin, a Program Manager within the US Air Force IT PMO. Justin is a GS-13 civil service employee who is the Service Owner of both Microsoft Teams and SharePoint Online. Justin is responsible for making sure that both Teams and SharePoint are integrated smoothly into the Air Force's existing operations and uses Teams to help him achieve success.

## 7:00 AM

While eating breakfast, Justin does a quick check of both the **Teams and Outlook mobile apps** on his government issued iPad. He makes sure to note his upcoming schedule for the day.

## 8:00 AM

Arriving at the office, he checks his Teams **Activity Feed** on his desktop computer. He reviews his **@mentions** and sees he has been asked to put together a presentation about the status of the Teams deployment project for leadership.

> **Tom** 7:42 AM
> **Justin**, please create a presentation about the status of the teams deployment project for leadership.

## 9:30 AM

Before beginning any of his deliverables, Justin makes sure to jot down all of the tasks he and his team need to complete in the team's **OneNote tab.**
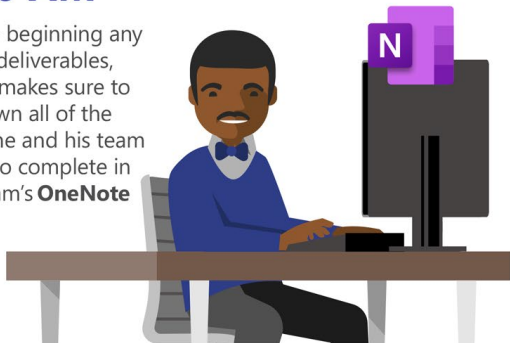
## 10:00 AM

Justin starts working on his PowerPoint presentation and **uploads the first draft to Teams** so he can have colleagues help gather the right content. He **@mentions** Liz and asks her to add a slide on the Champions Program.

> **Justin** 10:00 AM
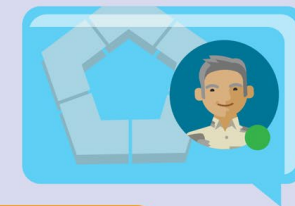> **Liz**, can you add a slide on the Champions Program?

## 12:00 PM

While on his way to the cafeteria, an Airman tells him about how their **collaboration** experience has drastically improved with Teams. Curious to learn more, Justin uses his mobile device to set up a meeting on Teams.
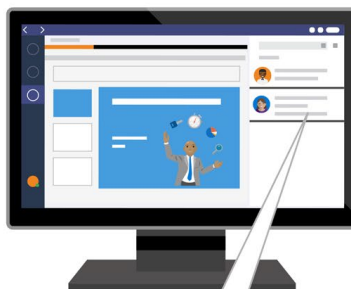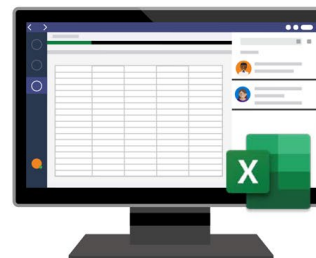
## 2:00 PM

Back at his desk, Justin finalizes his presentation and sends it directly to the CIO at the Pentagon via **1:1 chat** for final review.

## 3:30 PM

Justin makes some final updates to the upcoming Government Fiscal Year budgets for his program. Justin **edits the Excel document** that is pinned as a **tab** in the GFY20 Budgets Team.

## 4:30 PM

Justin receives the go-ahead from the CIO on his presentation and the OK to deploy Teams to all of USAF. He is ecstatic and shares the news to his team in an **announcements post** in Teams.
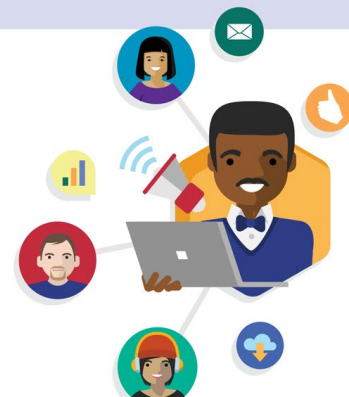
# Envision IT's Microsoft 365 Maturity Model

| Level | Teams | Stream | SharePoint | OneDrive | OneNote | Outlook |
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# Critical Rules of Engagement
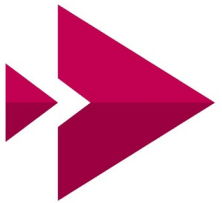
👉 Activity Feed becomes your new Inbox

💬 Set parameters around chat, conversations and reactions

! @mention to draw awareness

👥 Acknowledgements are the Microsoft Teams read-receipt

🚀 Teams is the launchpad for all O365 applications

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# Top 10 Teams Steps

**1. Start with chat**
Create a small group chat to communicate in the moment. Rename the chat and 'favorite' easy reference.

**2. Connect from anywhere**
Download the Microsoft Teams desktop and mobile apps to enable teamwork from anywhere.

**3. Go big**
Create larger teams with dedicated channels to collaborate on specific topics, projects, disciplines—whatever you like. Better to have fewer, larger teams with more channels than many, small teams with few channels.

**4. Customize channels**
Upload files to a channel and pin frequently used files to make it easy for everyone to find.

**5. Add apps to channels**
Integrate favorite apps and services—like Word, PowerPoint, Excel, Power BI, Planner, SurveyMonkey, HootSuite and more—with team chats and meetings.

**6. Consolidate 'need to know' content**
Use OneNote or Wiki features to spotlight important content, meeting notes, best practices, and goals without cluttering conversations.

**7. Spotlight resources**
Pin key websites used to track news, performance, live site monitoring or metric tracking.

**8. Elevate email conversations**
Forward an email to a Teams channel to get faster feedback within a threaded chat—attachments will upload automatically, ready for collaboration and co-authoring.

**9. Share content from other services**
Set up connectors to push rich content into Microsoft Teams from services like Trello, GitHub, Bing News, or Twitter; and get notified when users engage with that service.

**10. Help foster active channels**
Stay active in channels and **@team** to highlight posts for the whole group.

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# The Maturity Survey

## Envision IT's Microsoft 365 Maturity Model - Assessment Questionnaire

Our Microsoft 365 Maturity Model is designed to assess your team and organization to set a path for usage success. An important part of this model is user feedback, and this questionnaire covers use case scenarios that all users can attest to. Please answer these questions honestly, and to the best of your knowledge, allowing us to work together to design alignment to the maturity model at your own pace.

http://bit.ly/365Maturity

### Communications (Step 3 of 5)

This section focuses on how you and others communicate at work.

5. Which of the following represents how you communicate internally?

|  | Not Sure | Never | Rarely | Occassionally | Frequently |
|---|---|---|---|---|---|
| Email | ○ | ○ | ○ | ○ | ○ |
| SMS Text Message | ○ | ○ | ○ | ○ | ○ |
| Teams Individual Chat | ○ | ○ | ○ | ○ | ○ |
| Teams Group Chat | ○ | ○ | ○ | ○ | ○ |
| Teams Channel Conversations | ○ | ○ | ○ | ○ | ○ |
| @mentions | ○ | ○ | ○ | ○ | ○ |
| Teams Reactions | ○ | ○ | ○ | ○ | ○ |

### Documents and Information Management (Step 4 of 5)

6. Where do you currently store your documents?

|  | Not Sure | Never | Rarely | Occassionally | Frequently |
|---|---|---|---|---|---|
| My Documents | ○ | ○ | ○ | ○ | ○ |
| File Shares | ○ | ○ | ○ | ○ | ○ |
| OneDrive for Business | ○ | ○ | ○ | ○ | ○ |
| Microsoft Teams / Team Sites | ○ | ○ | ○ | ○ | ○ |

7. How do you share and collaborate on documents internally?

|  | Not Sure | Never | Rarely | Occassionally | Frequently |
|---|---|---|---|---|---|
| Email Attachment | ○ | ○ | ○ | ○ | ○ |
| Link to OneDrive | ○ | ○ | ○ | ○ | ○ |
| Link to SharePoint / Teams | ○ | ○ | ○ | ○ | ○ |

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# Training

With 20 years of training experience, we offer end-user training courses in:

- Microsoft Teams
- Modern Collaboration
- Microsoft 365



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# Sample Custom Courses

- Introduction to Teams
- Microsoft 365 Suite End-User Training
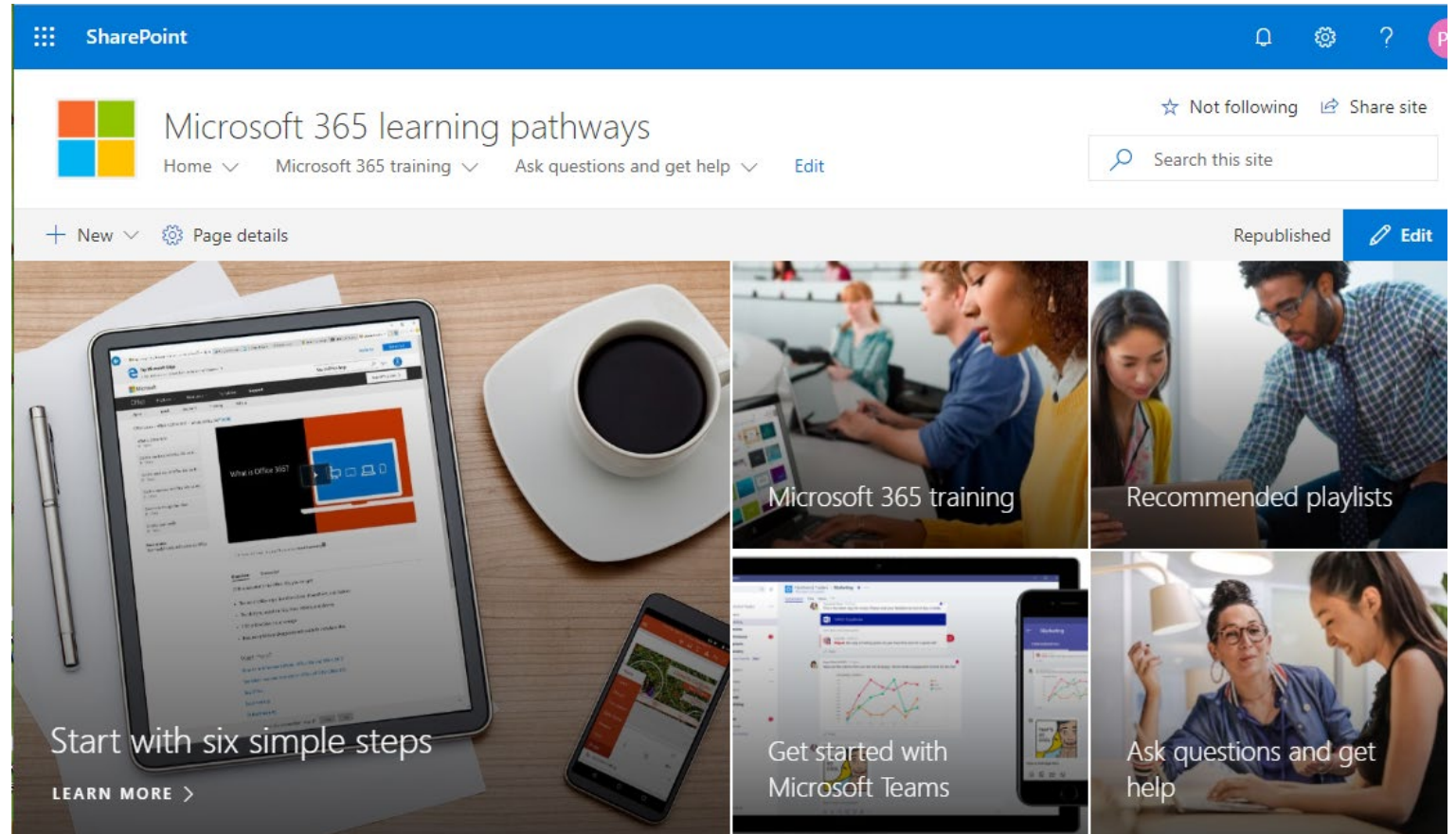- Microsoft 365 Design and Customization



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# Training Strategy and Options

| Technical | End-User | Knowledge Transfer Session | Custom Options |
|---|---|---|---|
| • Recommend official Microsoft Curriculum course delivered by 3rd parties | • Teams for End Users<br>• Collaboration for Site Members<br>• Collaboration for Site Owners | • Ad-hoc sessions<br>• Custom sessions on site configuration | • Custom training guides<br>• Lunch and Learns<br>• Quick Reference Cards |

✓ Hands-on train-the-trainer sessions

✓ Guides or PowerPoint decks provided

✓ Course design and schedule that fits your organization

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# Learning Pathways

- Collection of online training videos and quick help
- Not just for Teams, much of Microsoft 365
- Customizable
- Future friendly



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# Learning Pathways: Microsoft Teams
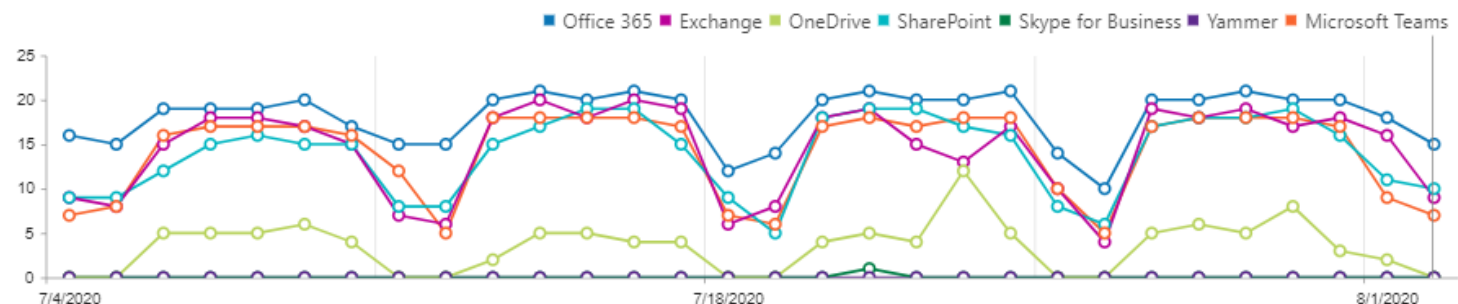
# Microsoft 365 Analytics – Productivity Score



https://docs.microsoft.com/en-gb/microsoft-365/admin/productivity/productivity-score?view=o365-worldwide

# Microsoft 365 Analytics – Usage
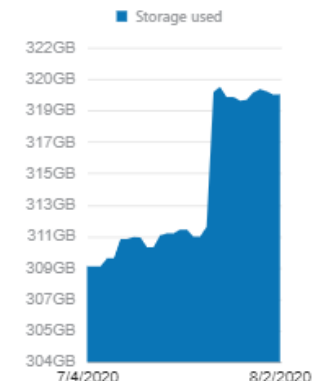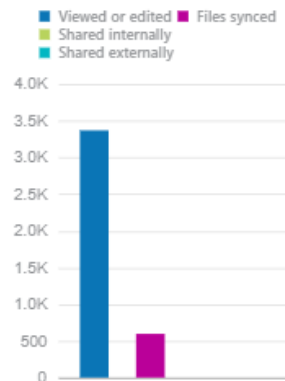
# OOTB Analytics and tyGraph

## Which Microsoft products are you using today?

| Product | OOTB | tyGraph Pulse |
|---|---|---|
| Microsoft Teams | Yes | Yes |
| Microsoft SharePoint | Yes | Yes |
| Microsoft Outlook | Yes | Yes |
| Microsoft OneNote | No | Yes |
| Microsoft Stream | No | Planned |
| Microsoft OneDrive | Yes | Yes |
| Microsoft Planner | No | Roadmap |
| Microsoft To-do | No | Roadmap |

## Which of the following represents how you communicate internally?

| Product | OOTB | tyGraph Pulse |
|---|---|---|
| Email Only | Yes | Yes |
| Text Messaging | No | No |
| Teams messages | Yes | See below |
| Individual Chat | No | Yes |
| Group Chat | No | Yes |
| Channel Conversation | No | Yes |
| @Mentions | No | Yes |

## How do you currently store and share information?

| Product | OOTB | tyGraph Pulse |
|---|---|---|
| My Documents on C: | No | No |
| File Shares | No | No |
| OneDrive for Business | Yes | Yes |
| Microsoft Teams / Team Sites | Yes | Yes |

## Sharing Links and Co-Authoring

| Product | OOTB | tyGraph Pulse |
|---|---|---|
| Shared links | No | Yes |
| Co-Authoring | No | Data is available |

## What do you typically do when in a meeting?

| Product | OOTB | tyGraph Pulse |
|---|---|---|
| Join via Microsoft Teams (desktop, app or web) | Unknown | Planned |
| Share your webcam and/or screen | Unknown | Planned |
| Record the meeting via Microsoft Stream | Unknown | Planned |

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# tyGraph

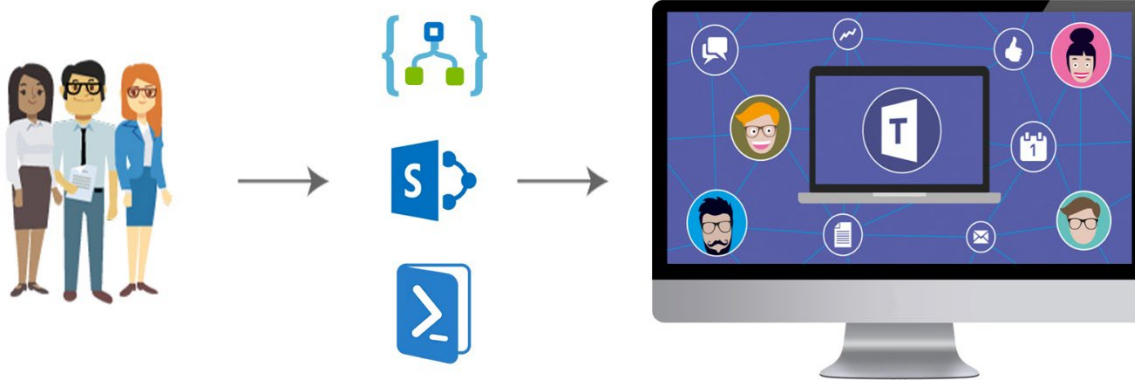*Actionable analytics for Microsoft 365*
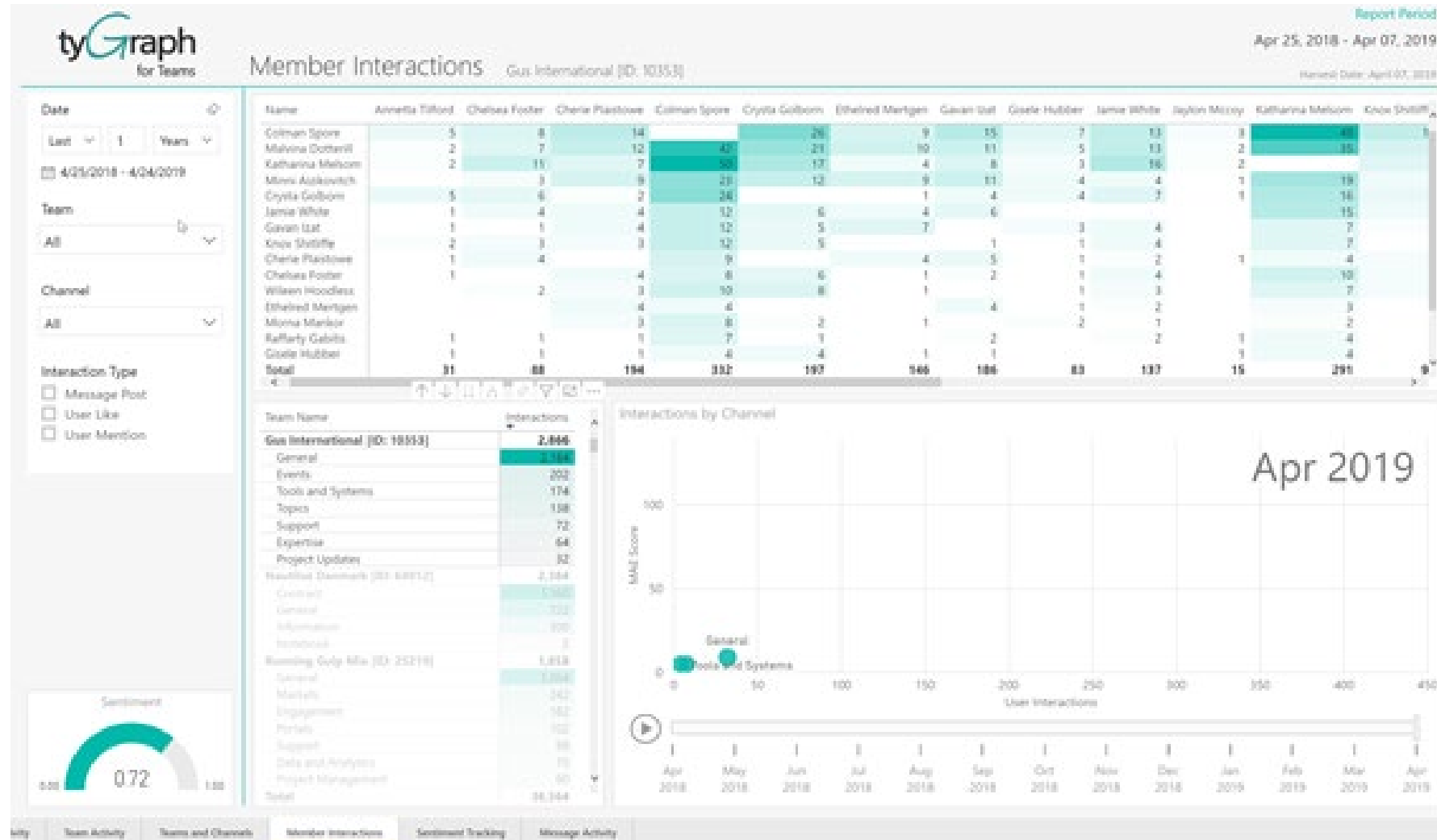
# Envision IT's Microsoft 365 Maturity Model Resources

- [Webinar: What is the Microsoft 365 Maturity Model?](#)
- [Webinar: Capturing and Evaluating Analytics on your Microsoft 365 Maturity Model Progress](#)
- [Webinar: Plan for a Successful Migration into Microsoft 365](#)
- [Featured Service: Envision IT Microsoft 365 Maturity Model](#)



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# Teams / Site Provisioning



- White Papers
- Open Source project
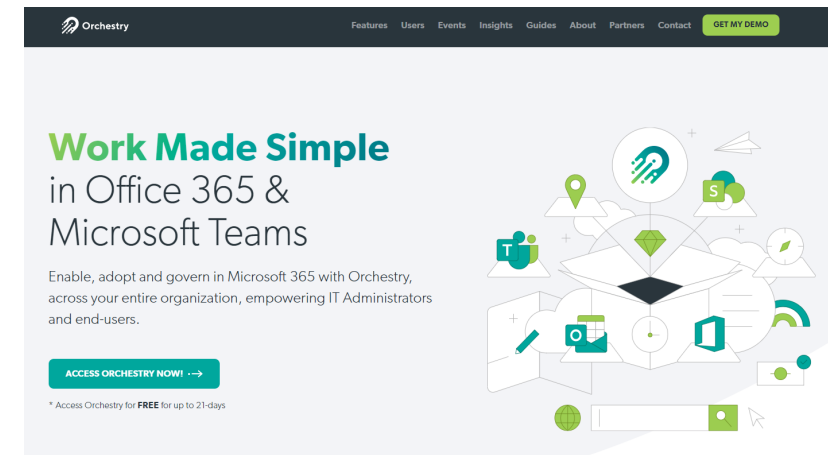- Webinars
- http://eum.co/teams-provisioning

# Next Steps and Coming Up

## www.envisionit.com/events

To learn more about Envision IT's Microsoft 365 Maturity Model, please book a meeting at:

https://calendly.com/envisioneric

Conversation on Teams and Microsoft 365 Governance and Provisioning with Peter Carson and Michal Pisarek

Tue Sep 15th @ 2 PM ET



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