

PLAN FOR A SUCCESSFUL MIGRATION INTO MICROSOFT 365



Agenda



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- 20+ Years experience in SharePoint
- Speaker and Author
- Thought-leader in the areas of strategy and governance
- Passion for MS Teams use
- @RizInsights

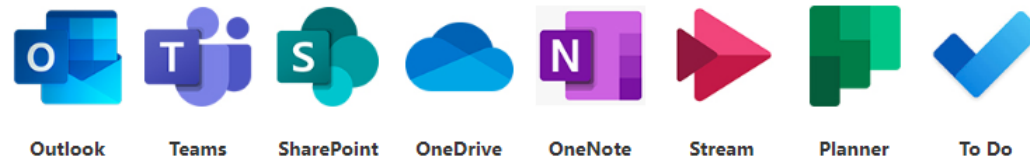


- There are 5 stages to the Envision IT Microsoft 365 Maturity Model:

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



What to Use When?



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

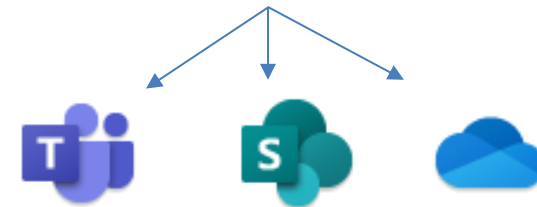


Level	Teams	Stream	SharePoint	OneDrive	OneNote	Outlook
Optimized	Business transformation and process development; usage of >95%	All meetings are recorded and processed; policies exist to record based on retention and regulatory needs	External data is leveraged; multiple systems are integrated with SharePoint; usage >85%	All files and workloads are synchronized (local files do not 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

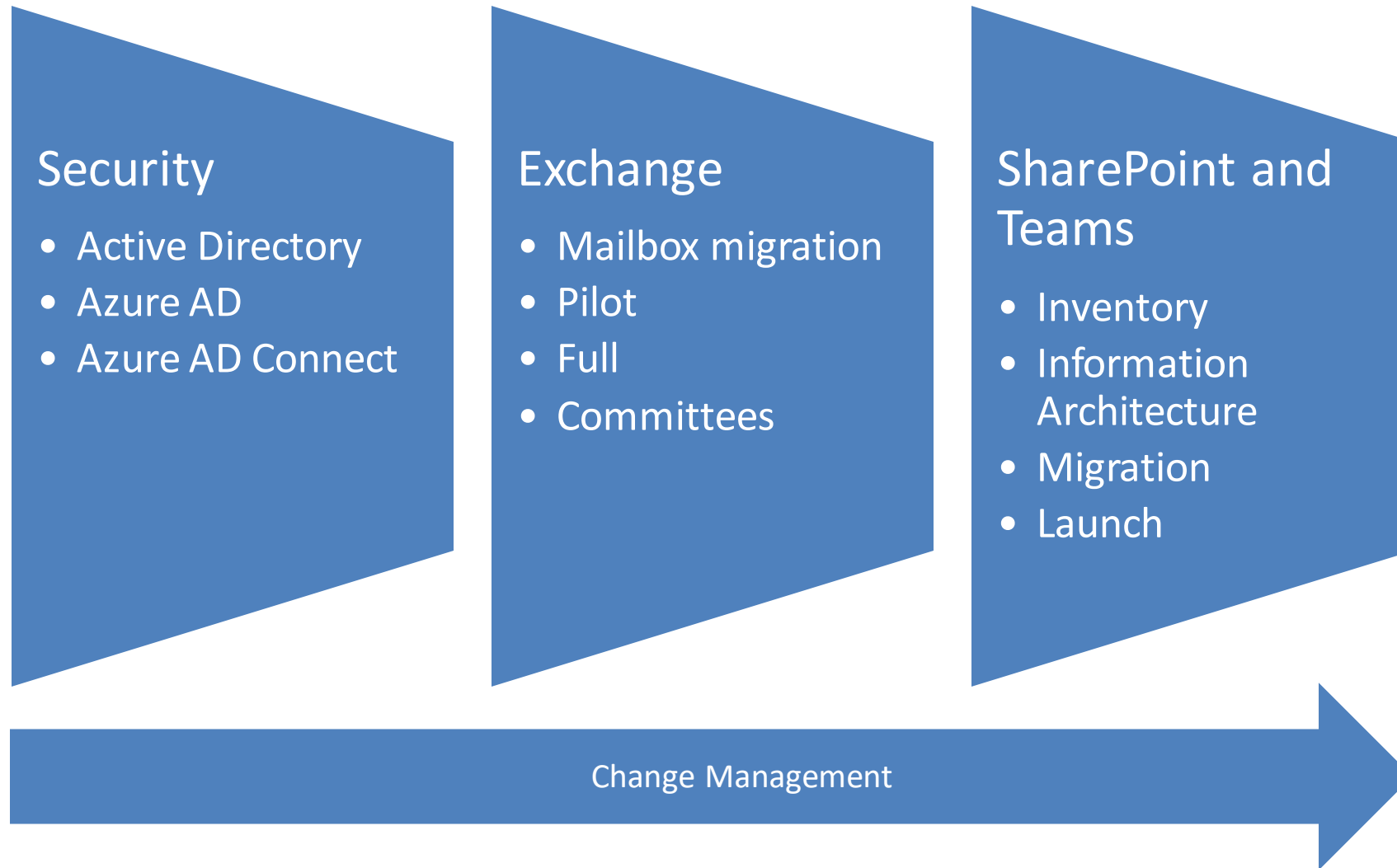
Project Overview

On Premises

Microsoft 365

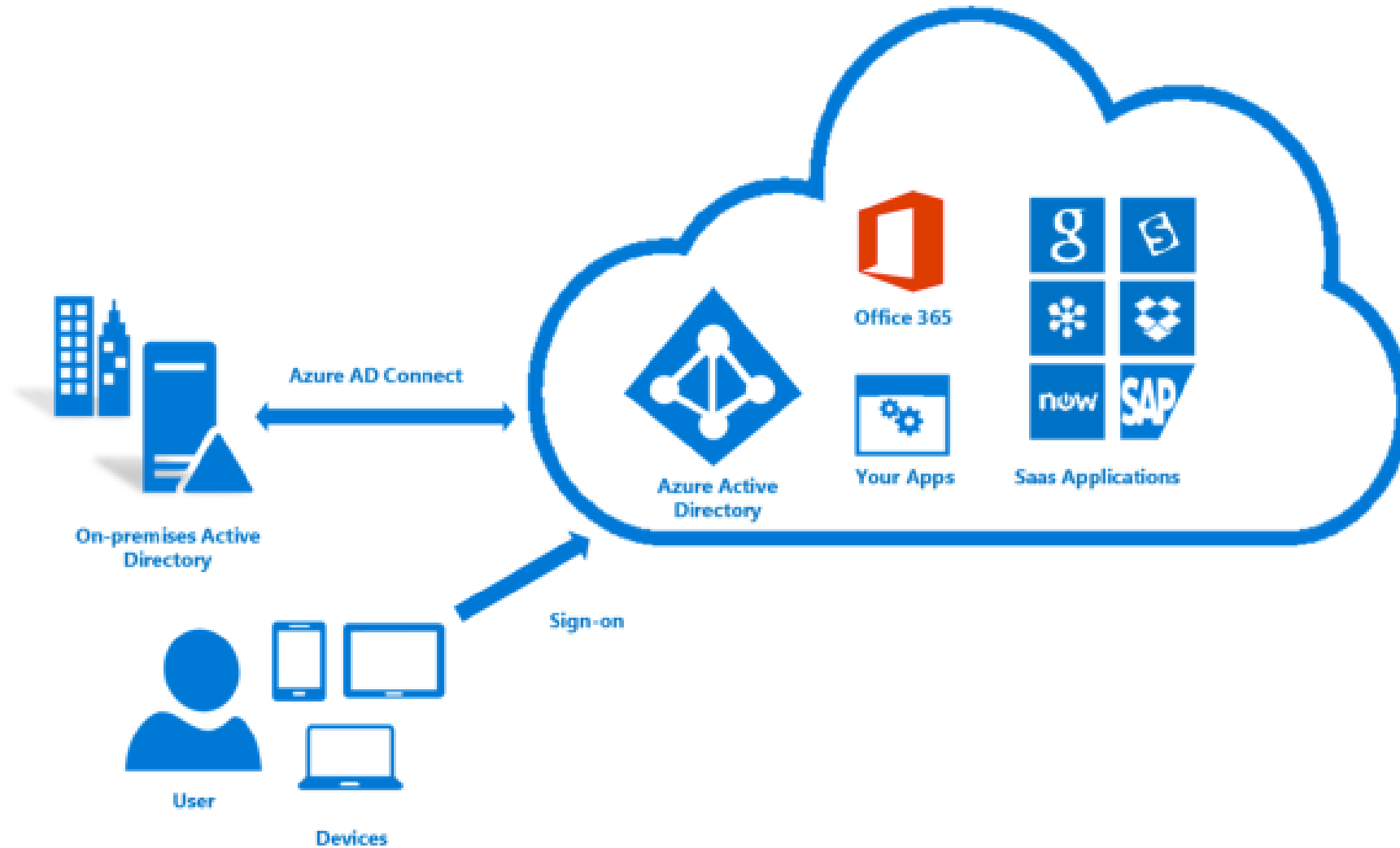


Project Overview



Security, Authentication, and Authorization

Azure AD Connect



>1.2M

compromised accounts in January 2020

> 99.9%

compromised accounts did not have MFA

67%

Reduction in compromises in
tenants who disable legacy auth

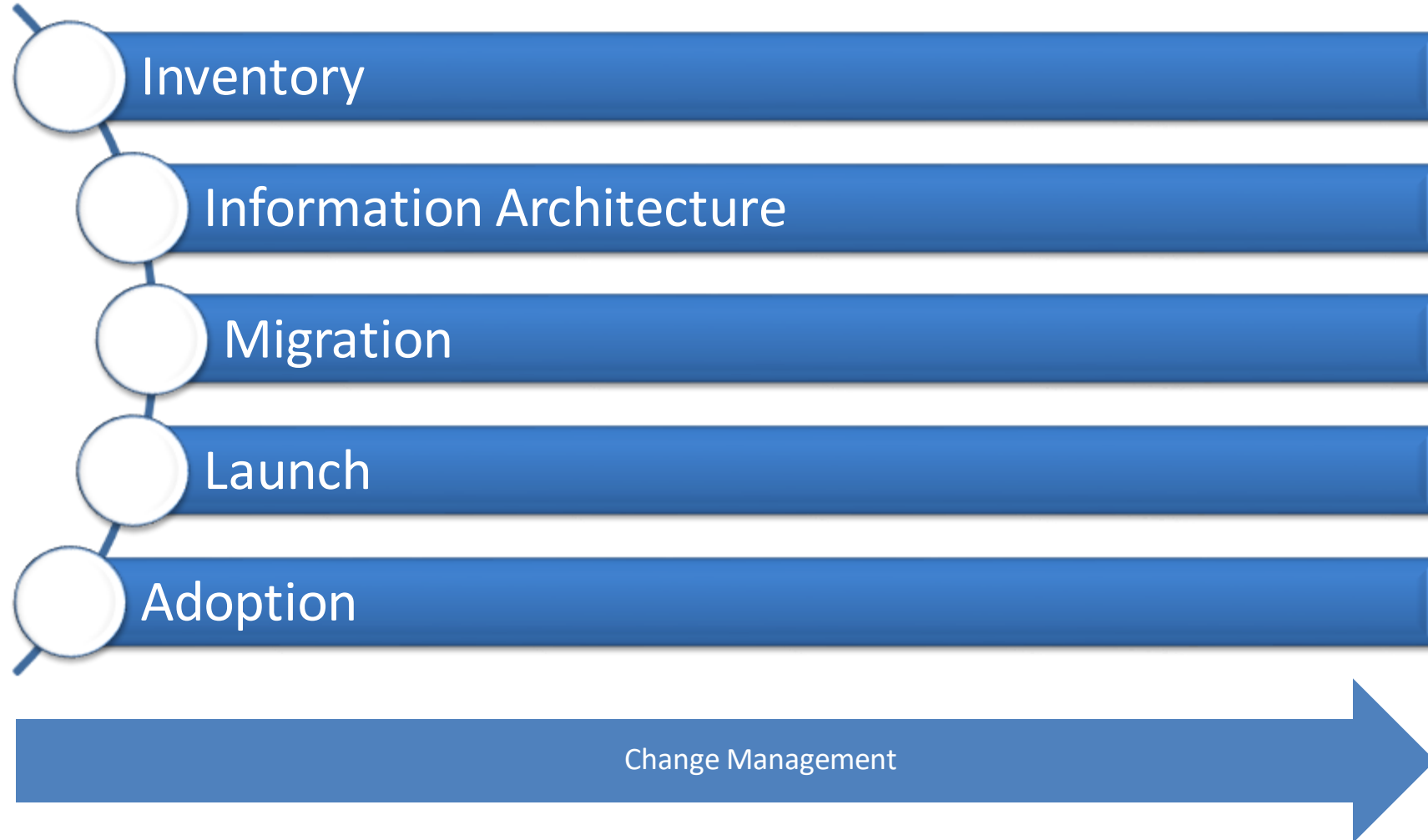
Office 365 Security Best Practices

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

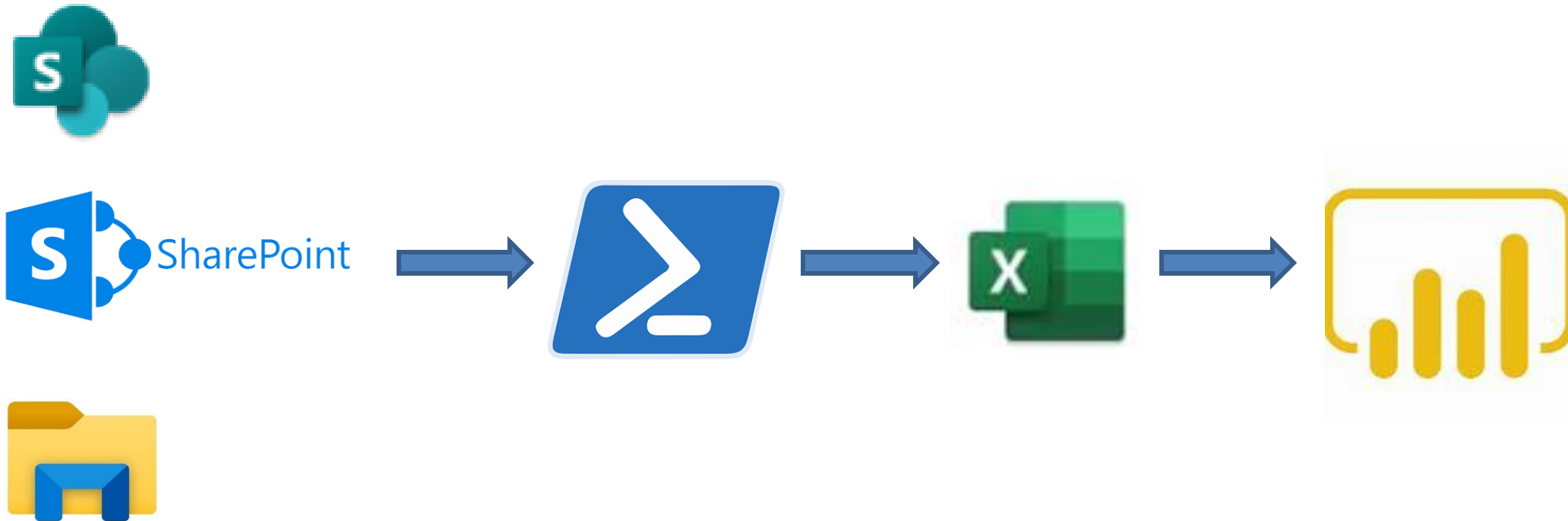
<https://docs.microsoft.com/en-us/office365/admin/security-and-compliance/secure-your-business-data?view=o365-worldwide>

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

Three Places to Work



Chat

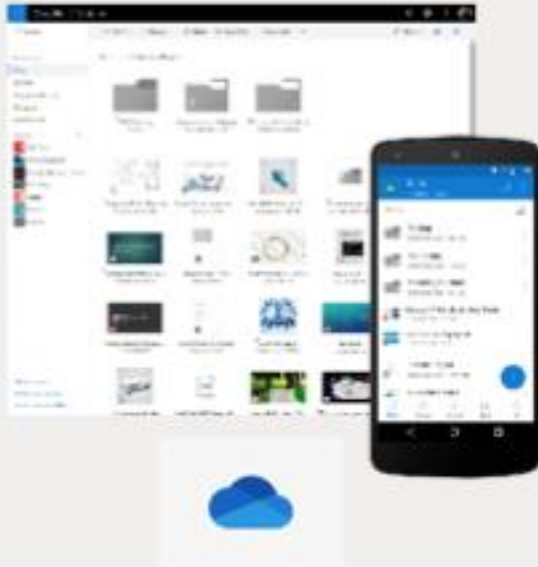
Microsoft Teams

Channel
Conversations

SharePoint



OneDrive for Business



Private by
default

Team sites



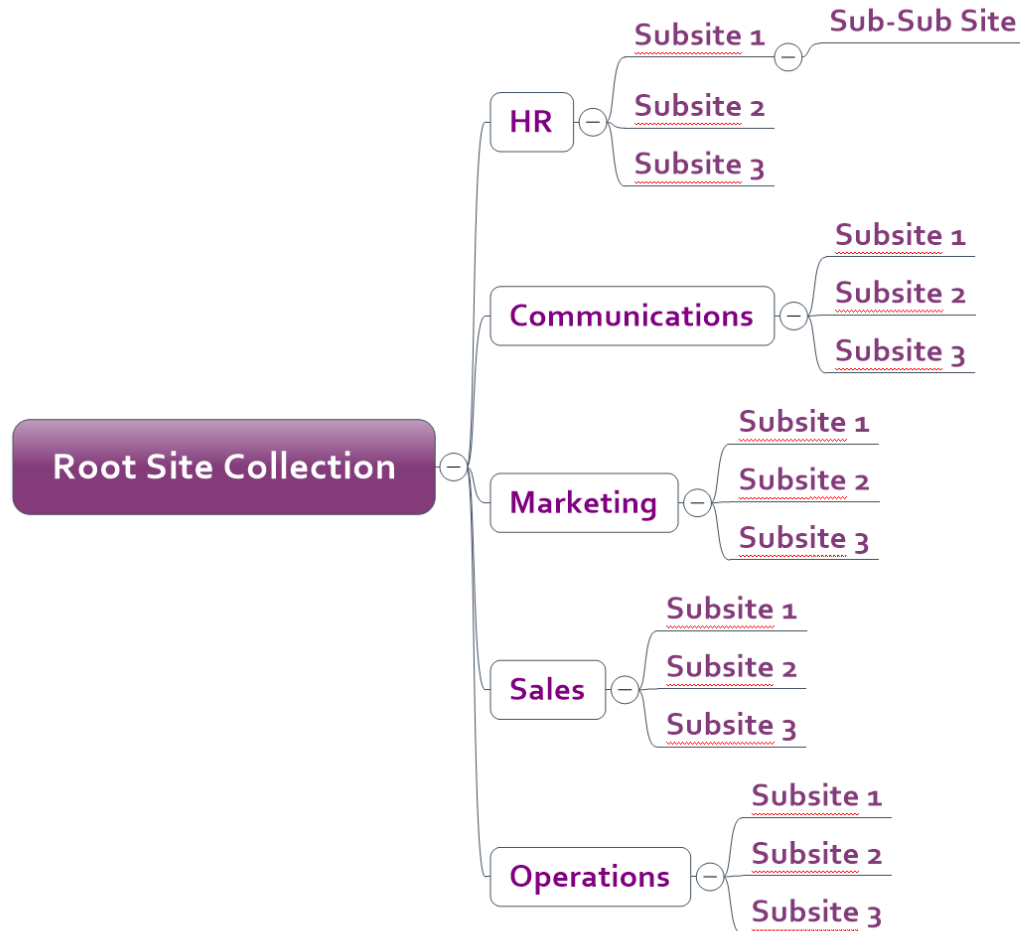
Share content
with your group

Communication sites



Inform and engage a
broader audience

Classic vs. Modern IA



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	

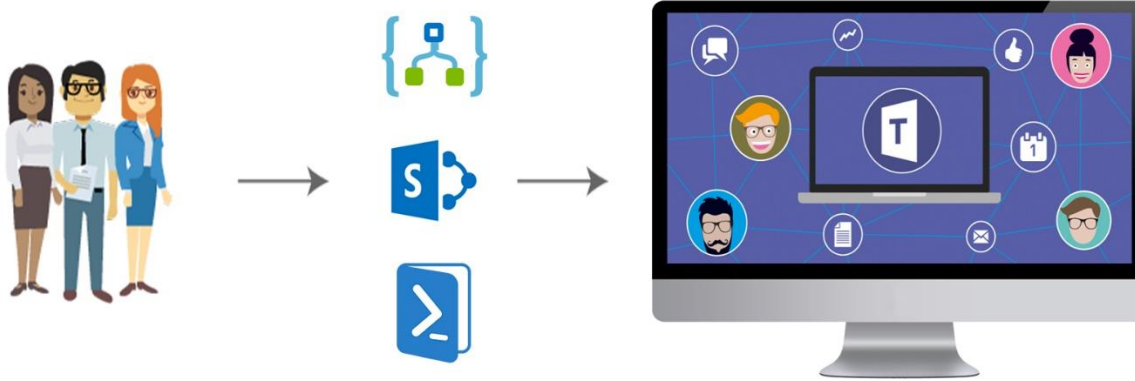
Folders, Document Sets, and Metadata

- 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

Demo

Teams Provisioning Implementation

Teams / Site Provisioning



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

Teams and Site Provisioning Process

Site Request

Division *

Leviathan Security Group

Site Template *

Client Site

Title *

Purpose

Alias *

Public Group

☒ Yes

Create Team

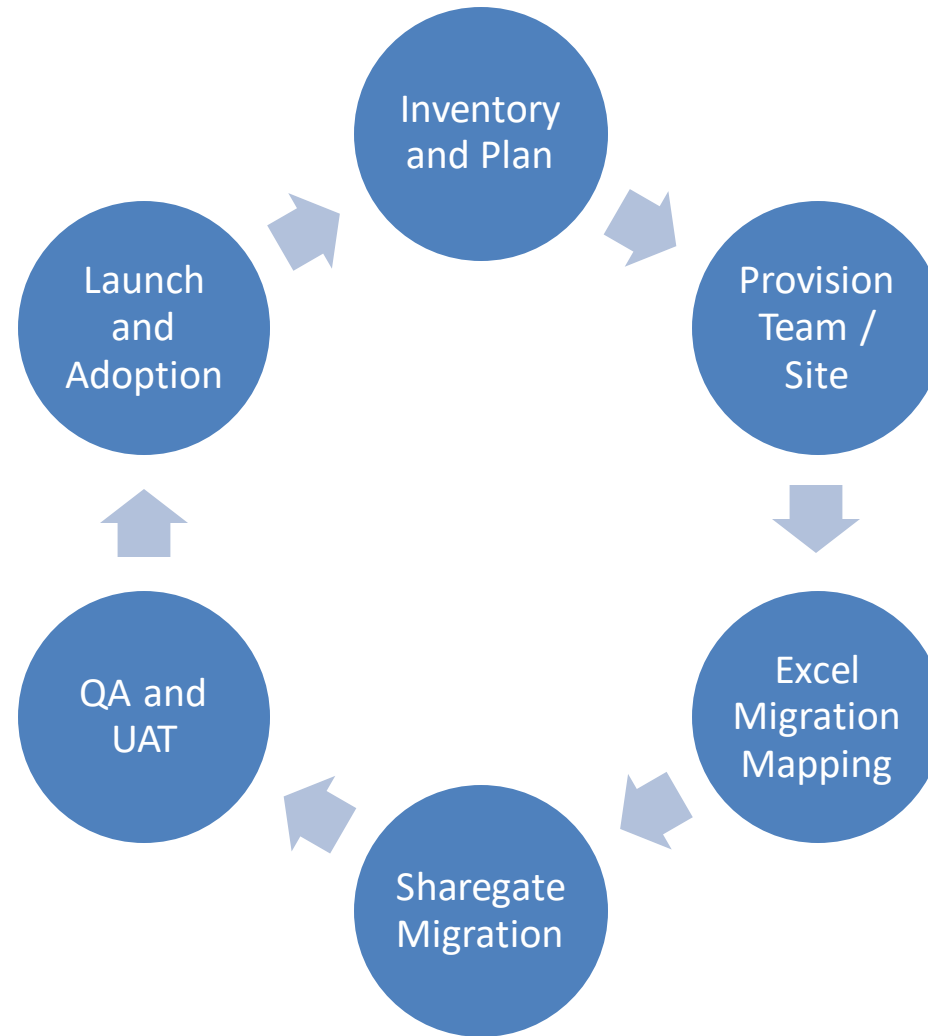
☒ Yes

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

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

Pre-Upgrade Assessment

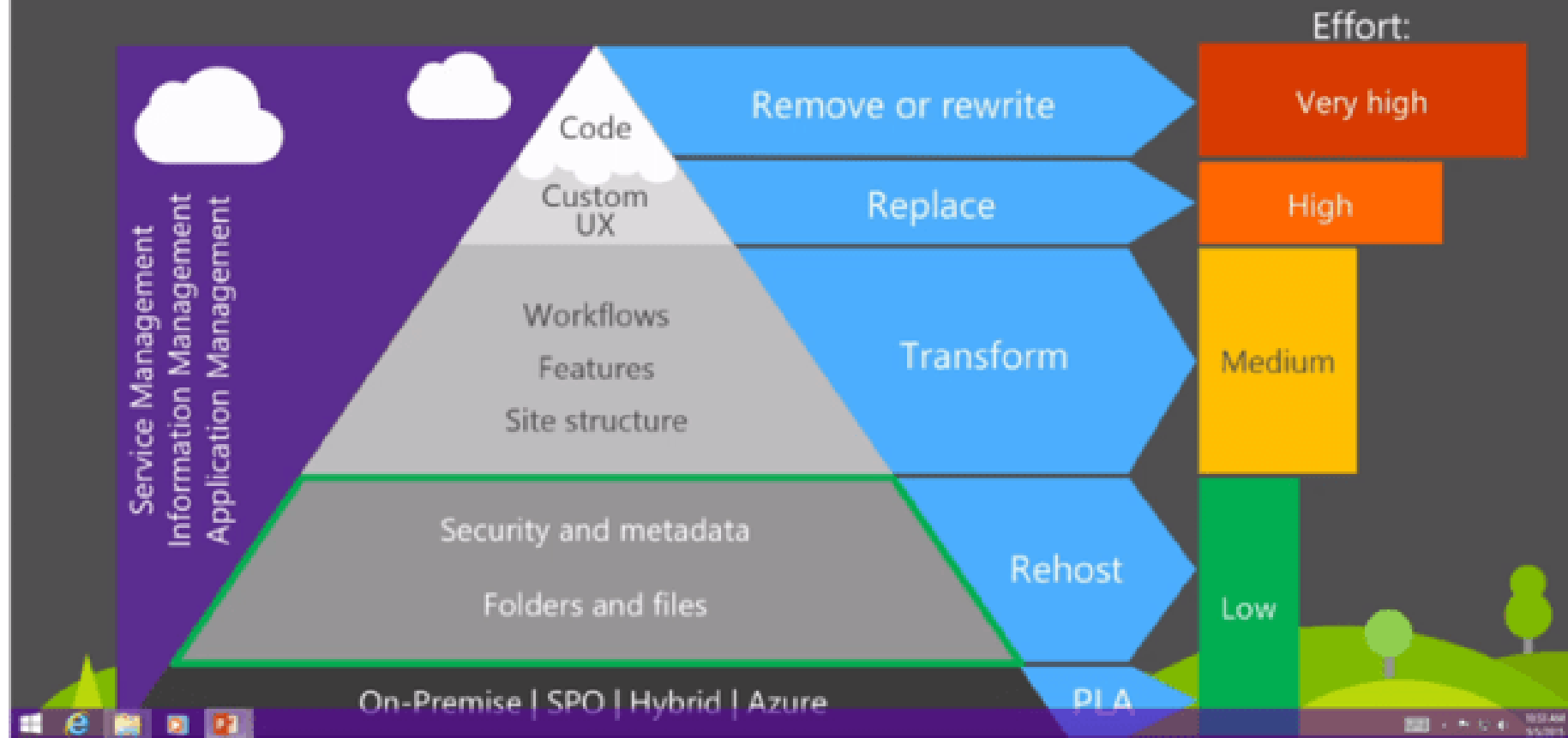
Steps

- 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

Migrating The Collaboration Triangle



<https://slideplayer.com/slide/13041452/>

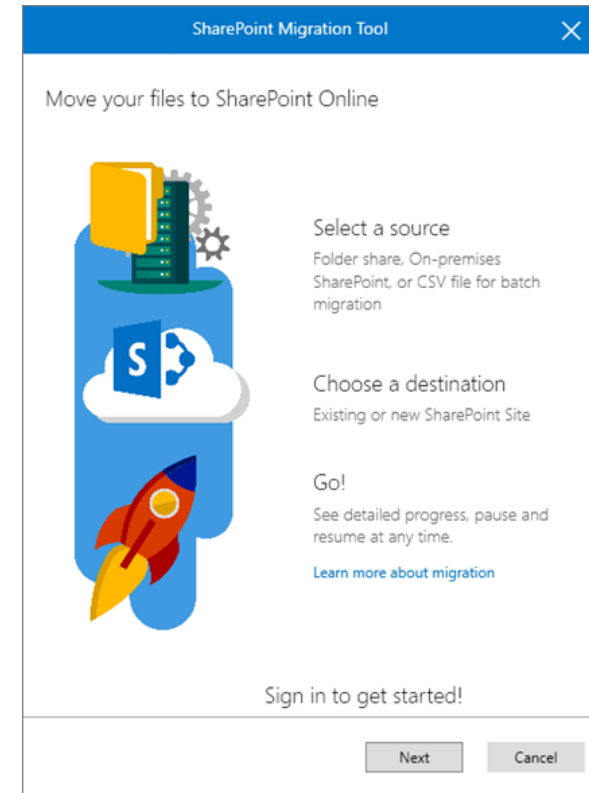
Planning

- 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.

Migration Tools

Sharegate

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



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

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

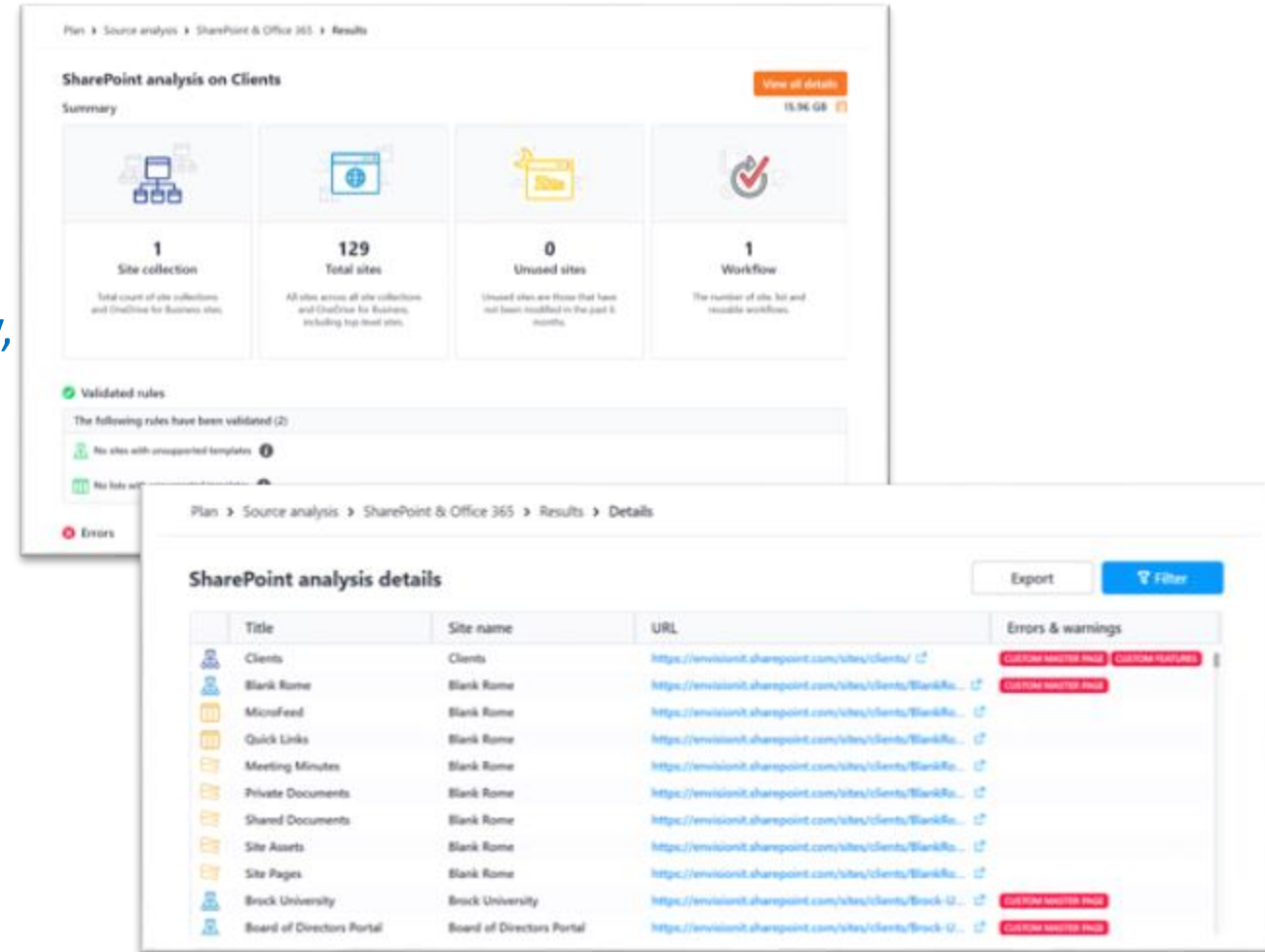
Sites with Custom
Permissions
Report

External Sharing
Report

Workflow Report

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

The screenshot displays the Sharegate interface for generating a Permissions Matrix Report. It is divided into two main sections: 'Options' and 'Results'.

Options Section:

- Plan > Targets > Options**
- Permissions matrix report**
Get a complete overview of the permissions assigned to your subsites, lists, libraries, folders, documents, and items.
- Permissions matrix report targets**
Clients
<https://envisionit.sharepoint.com/sites/Clients/>
- Users and groups**
Select the users and groups you want to be displayed in your report.
All users and groups
- Select object types**
Select the objects you would like to add to your report.
☒ Lists
☒ List content
- Run now** (button)

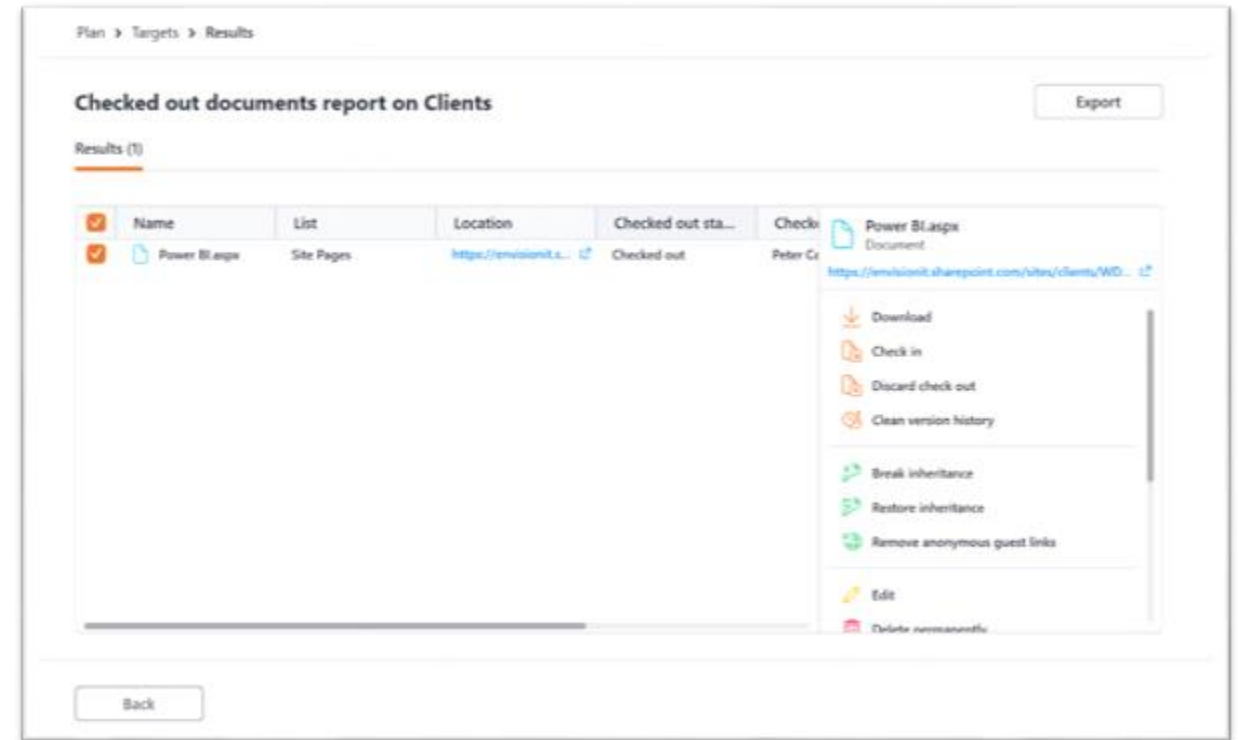
Results Section:

- Plan > Targets > Options > Results**
- Permissions matrix report on Clients**
- Export** (button)
- Navigation:** Meeting Minutes, Private Documents, Shared Documents, Site Pages
- Table:**

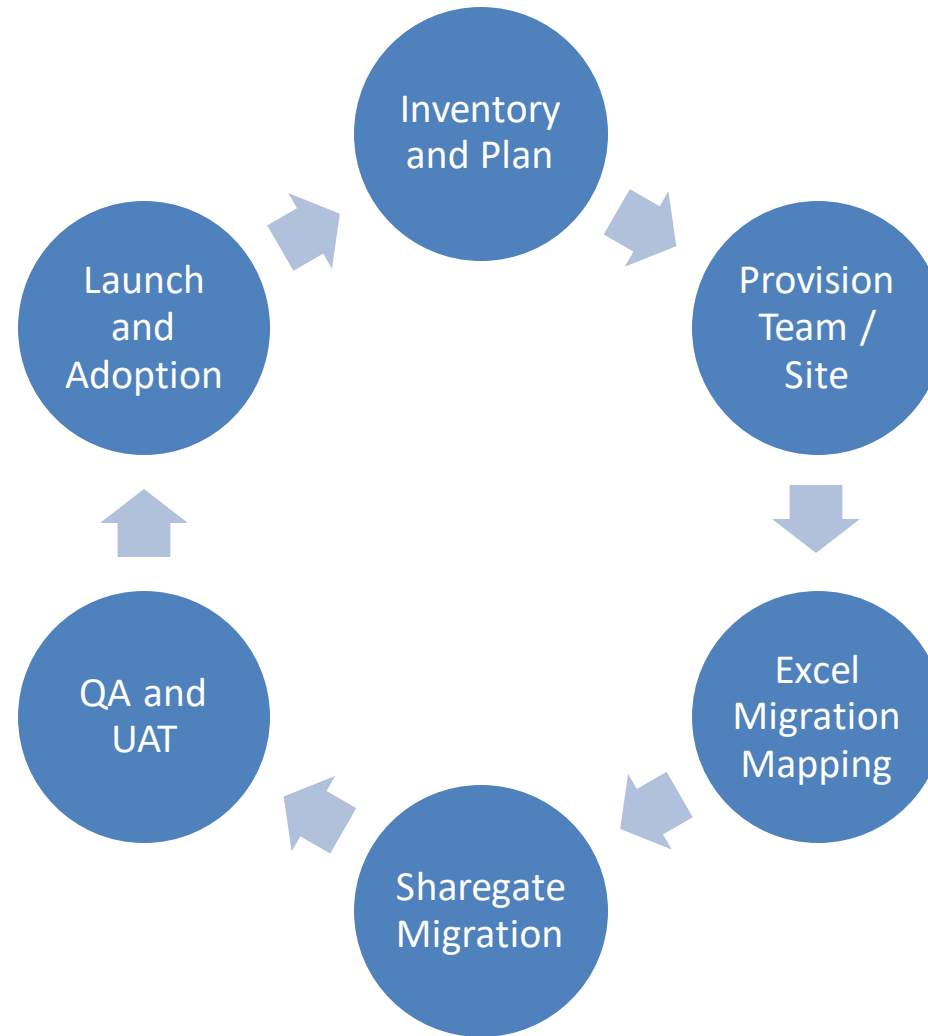
Same as parent	View	User/group	Given through	Full Control	Design	Contribute
+		Staff	Explicit	✓		
		Cody Broker	Explicit			✓
		Muzefa Jammagarwala	Explicit	✓		
		SQLP_agent	Explicit			
Same as parent	View					
Same as parent	View					

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

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.



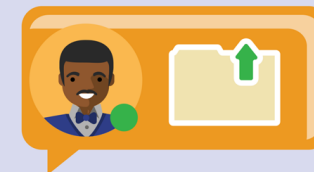
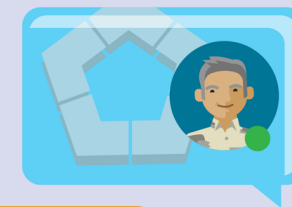
12:00 PM

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.



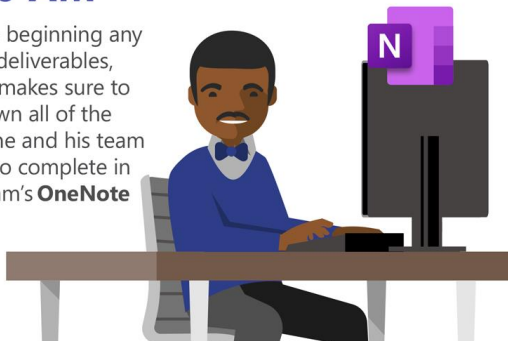
2:00 PM

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.



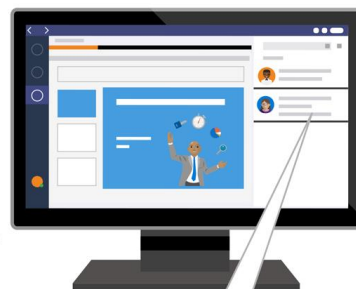
9:30 AM

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.



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.

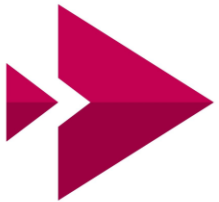


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Critical Rules of Engagement



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

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.

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	Occasionally	Frequently
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SMS Text Message	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams Individual Chat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams Group Chat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams Channel Conversations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
@mentions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teams Reactions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Documents and Information Management (Step 4 of 5)

6. Where do you currently store your documents?

	Not Sure	Never	Rarely	Occasionally	Frequently
My Documents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
File Shares	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OneDrive for Business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Microsoft Teams / Team Sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

	Not Sure	Never	Rarely	Occasionally	Frequently
Email Attachment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Link to OneDrive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Link to SharePoint / Teams	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Training

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

- Microsoft Teams
- Modern Collaboration
- Microsoft 365



Sample Custom Courses

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



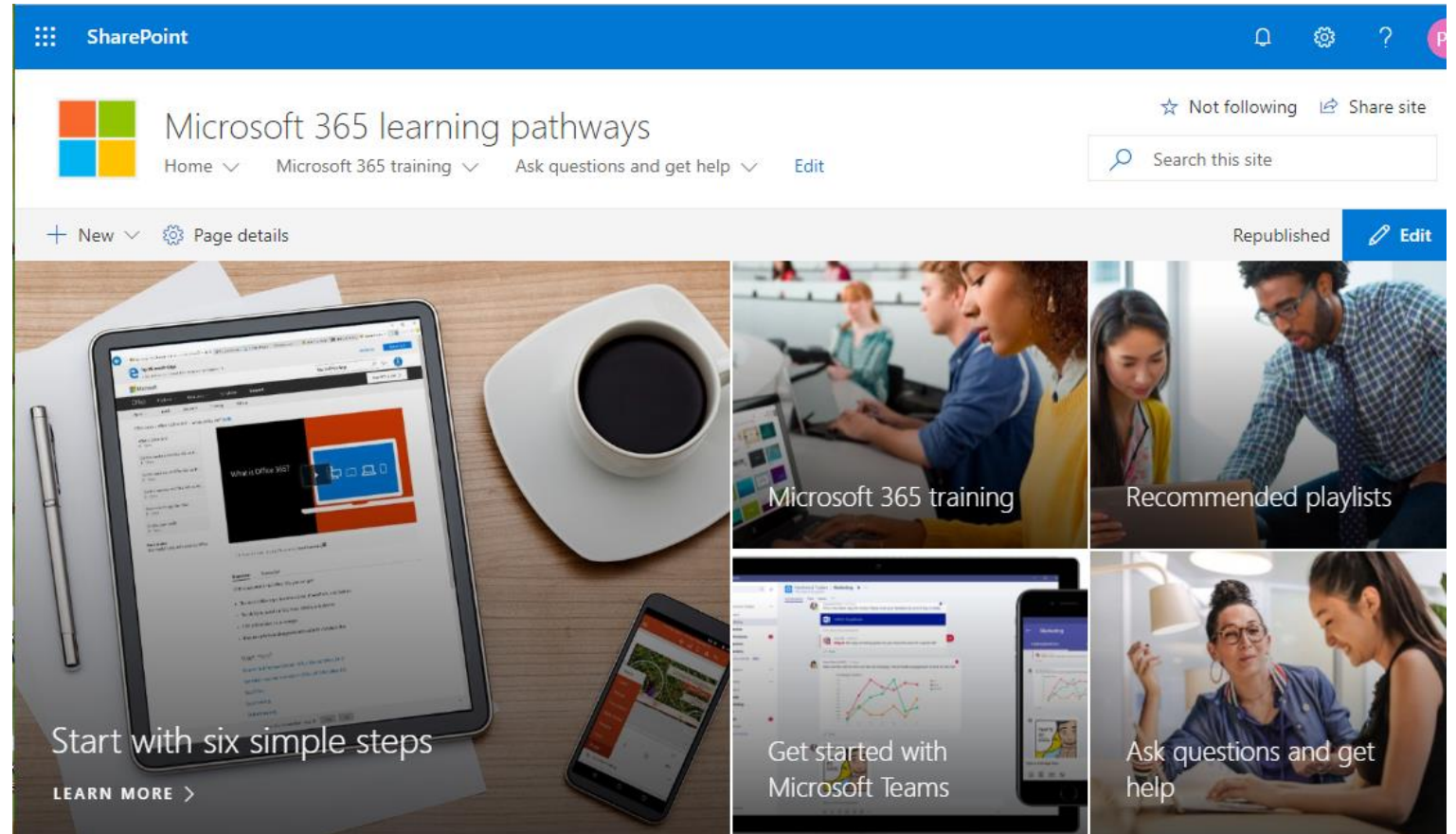
Training Strategy and Options

Technical	End-User	Knowledge Transfer Session	Custom Options
<ul style="list-style-type: none">• Recommend official Microsoft Curriculum course delivered by 3rd parties	<ul style="list-style-type: none">• Teams for End Users• Collaboration for Site Members• Collaboration for Site Owners	<ul style="list-style-type: none">• Ad-hoc sessions• Custom sessions on site configuration	<ul style="list-style-type: none">• Custom training guides• Lunch and Learns• Quick Reference Cards

- ✓ Hands-on train-the-trainer sessions
- ✓ Guides or PowerPoint decks provided
- ✓ Course design and schedule that fits your organization

Learning Pathways

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

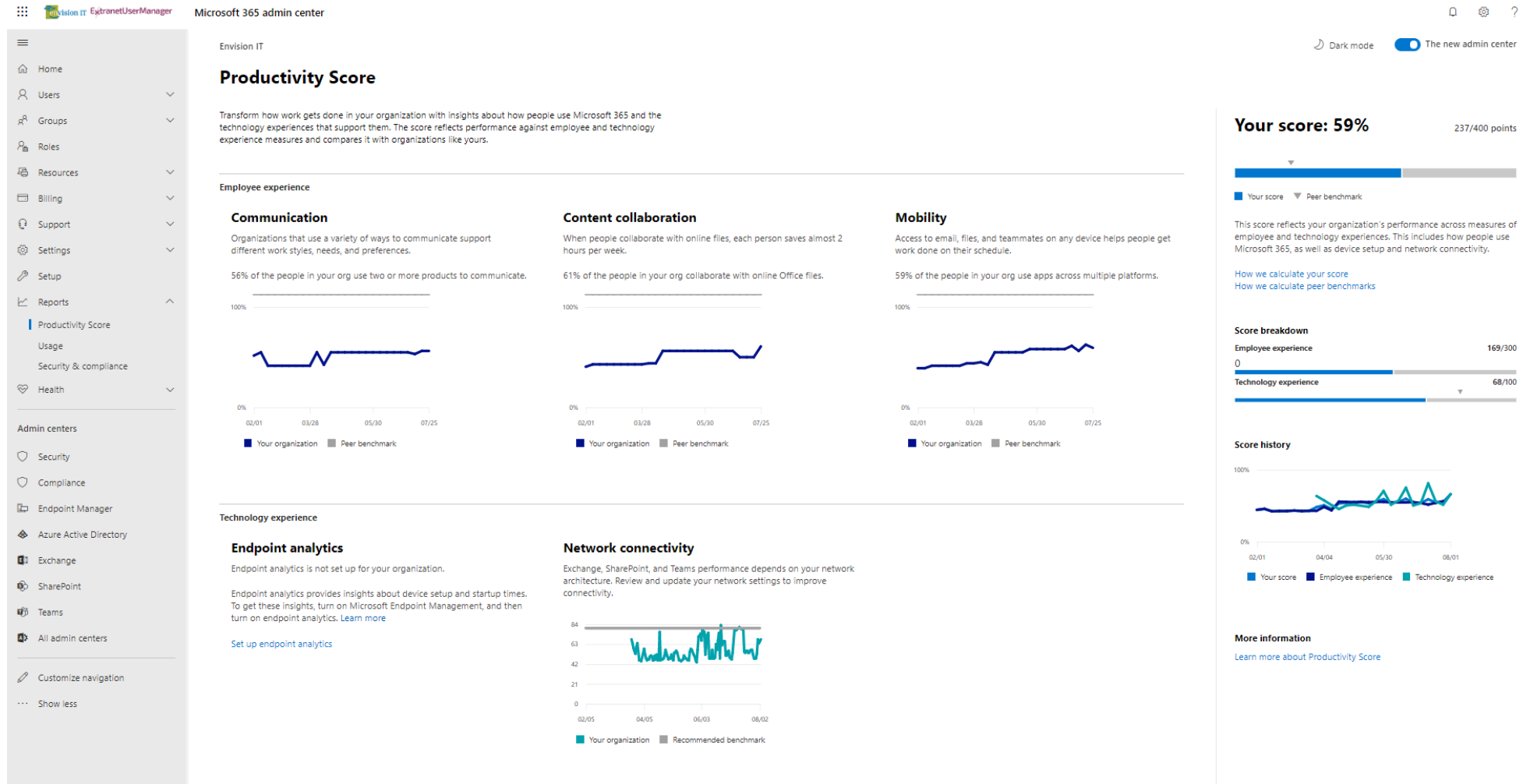


Learning Pathways: Microsoft Teams

The screenshot shows a SharePoint page for 'Microsoft 365 learning pathways'. The top navigation bar includes 'Home', 'Operations', 'Clients', 'Sales', 'Products', 'Marketing', 'Development', and 'Quick Links'. A search bar is present on the right. Below the navigation, the page title 'Microsoft 365 learning pathways' is displayed with a 'Home' dropdown and a 'Microsoft 365 training' dropdown. A 'New' button and 'Send by email', 'Promote', and 'Page details' options are visible. The main content area features a banner for 'Get started with Microsoft Teams' with a video thumbnail showing a person speaking. Below the banner, a breadcrumb trail reads 'Home > Products > Microsoft Teams'. A dropdown menu allows users to 'Choose the courses that suit you best'. Four learning modules are presented in a grid:

- Teams Quick Start**: Learn how to create a Team, Use chat, Edit files at the same time, See likes, and Customize. **For End User**. Icon: Clock.
- Work with posts and messages**: Create and format a post to start a conversation in a channel. **For End User**. Icon: Speech bubble.
- Intro to Microsoft Teams**: Learn about Teams, Setting up a channel, Meetings, Calls, and other Activities. **For End User**. Icon: Group of people.
- Upload and find files**: Upload and find files in Teams. **For End User**. Icon: Document with upload arrow.

Microsoft 365 Analytics – Productivity Score

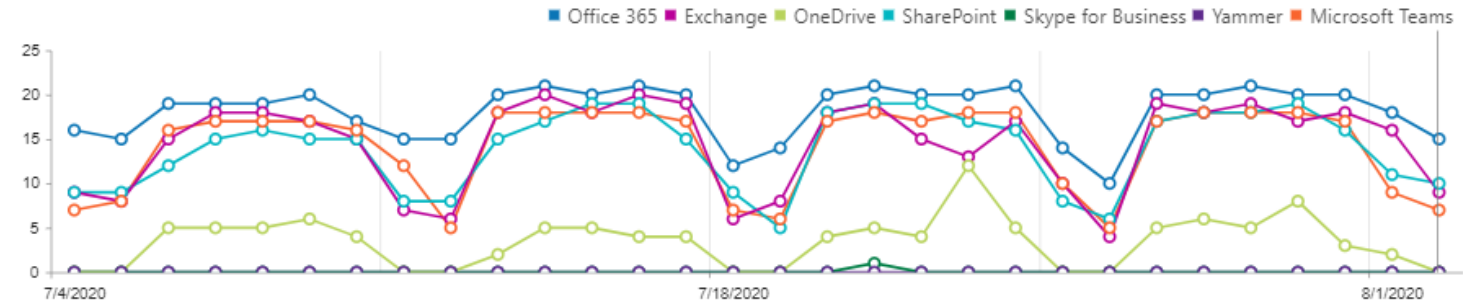


<https://docs.microsoft.com/en-gb/microsoft-365/admin/productivity/productivity-score?view=o365-worldwide>

Microsoft 365 Analytics – Usage

- Exchange
- Forms
- Forms Pro
- Microsoft Teams
- Office 365
- OneDrive
- SharePoint
- Skype for Business
- Yammer

Active users



Understanding Remote Work Elements

Has usage of communication solutions changed?

- 3.6% ↓ Email activity
- 11.5% ↓ Microsoft Teams user activity
- Yammer activity

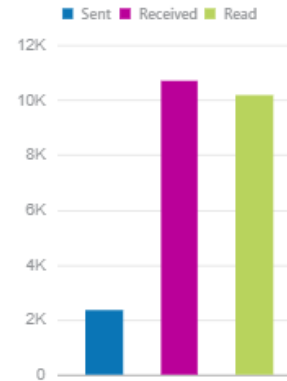
Has usage of Microsoft 365 apps changed?

- 5.0% ↑ Microsoft 365 Apps usage

How file activity in the cloud has changed?

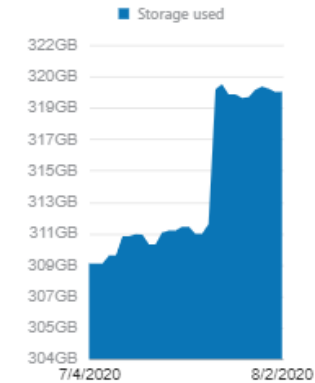
- 1.4% ↑ OneDrive activity
- 0.7% ↑ SharePoint activity

Email activity
13.1K 3.6% ↓



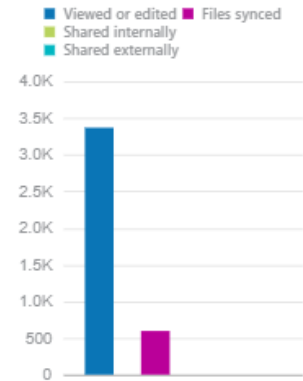
Active users - 22 of 32

OneDrive files
234.1K 1.4% ↑



Active users - 17 of 33

SharePoint files
88.0K 0.7% ↑



Active users - 20 of 33

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

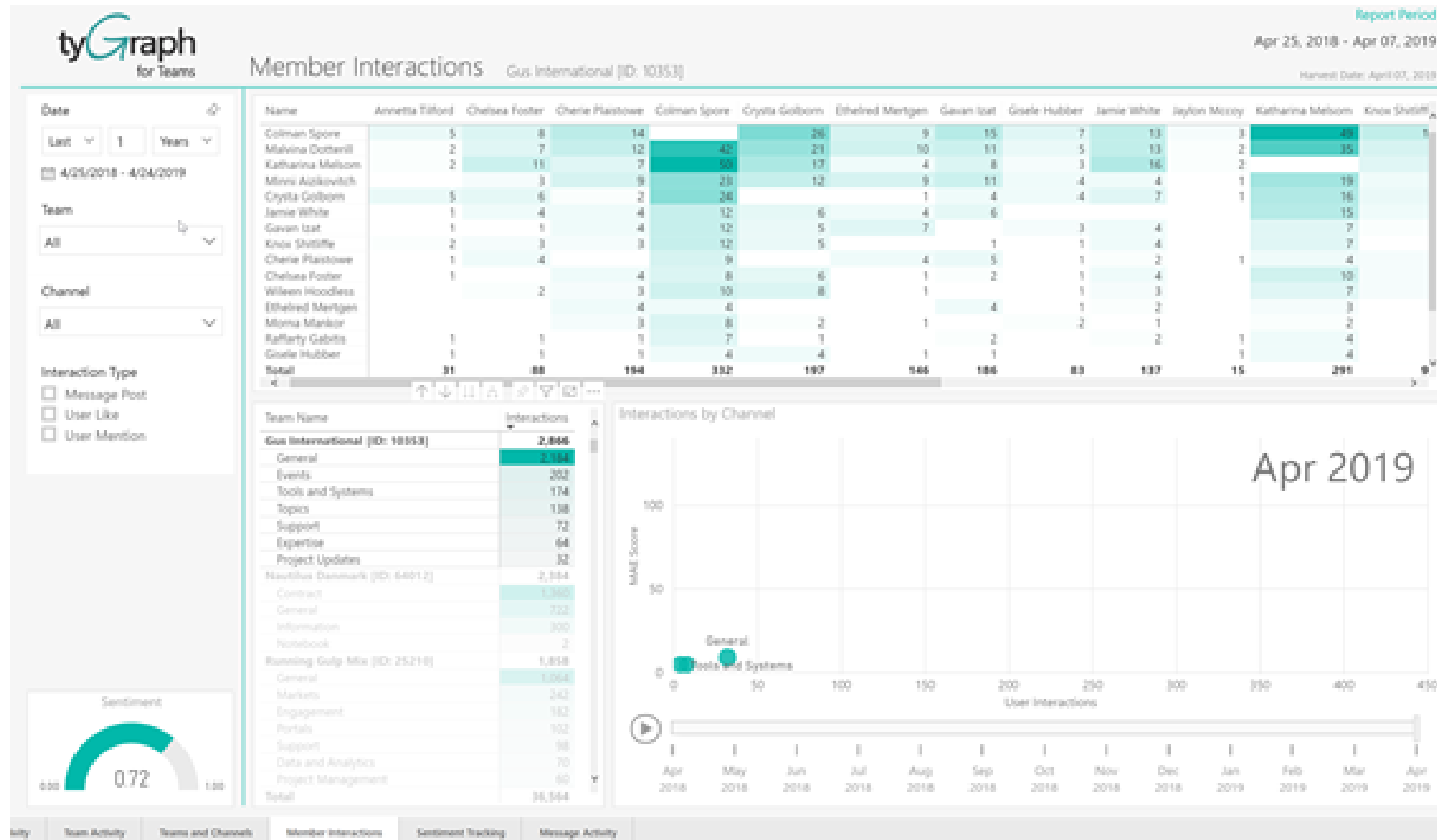
Product	OOTB	tyGraph Pulse
Shared links	No	Yes
Co-Authoring	No	Data is available

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

tyGraph

Actionable analytics for Microsoft 365

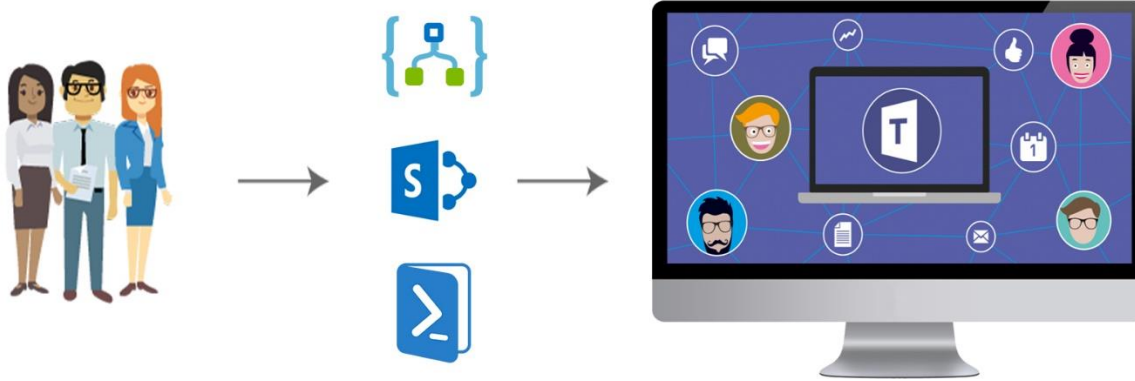


Envision IT's Microsoft 365 Maturity Model Resources

- [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](#)



Teams / Site Provisioning



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

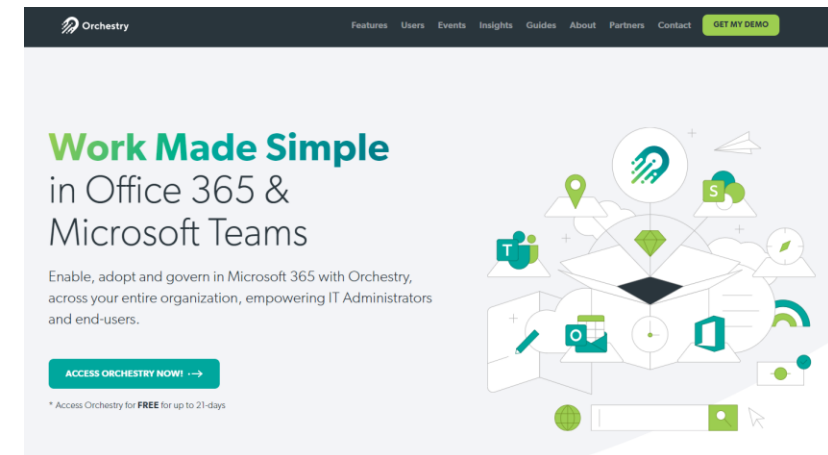
Next Steps and Coming Up

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



www.orchestrity.com