



# MASTER MOVERS DATA MIGRATIONS PLANNING GUIDE

# CONTENTS

|   |   |
|---|---|
| <b>PART 1: WHAT ARE YOU MIGRATING</b> ..... | 3 |
| <b>PART 2: PLANNING</b> .....               | 4 |
| <b>2.1: USER EXPERIENCE</b> .....           | 4 |
| <b>2.2: IDENTITY</b> .....                  | 6 |
| <b>2.3: INTERGRATIONS</b> .....             | 7 |
| <b>2.3: BUILDING A STRATEGY</b> .....       | 8 |
| <b>PART 3: SUMMARY</b> .....                | 9 |



# PART 1

## WHAT ARE YOU MIGRATING?

Whether you are still in the planning phase or have begun your migration journey you face a complex task juggling these common risk areas:

- Understanding the amount and location of your data
- Email downtime and user experience
- Regulatory compliance
- License optimization
- Day-one data accessibility



**FILE  
ARCHIVES**



**EMAIL  
ARCHIVES**



**PST  
CONSOLIDATIONS**



**MICROSOFT 365  
TENANTS**

It is safe to say, the longer the data has been in place the more planning considerations there will be.

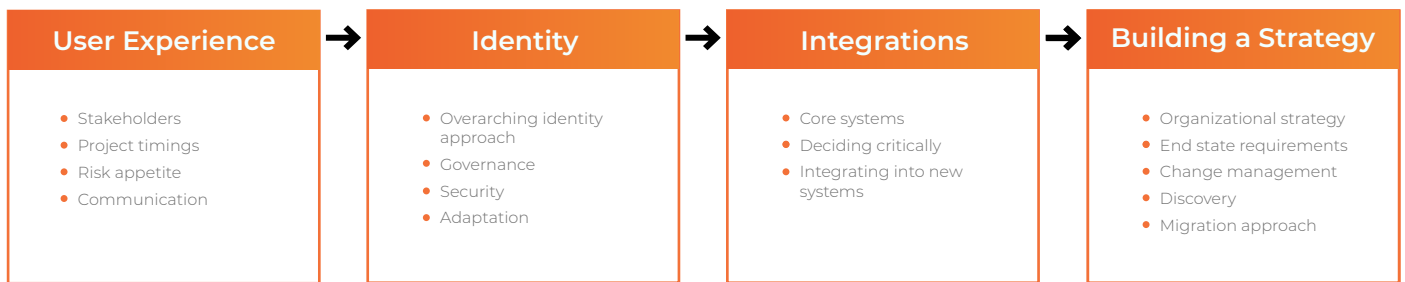


# PART 2

## PLANNING

Planning your migration is the most important step and could take the longest amount of time. You should know all the business and technical requirements before getting started.

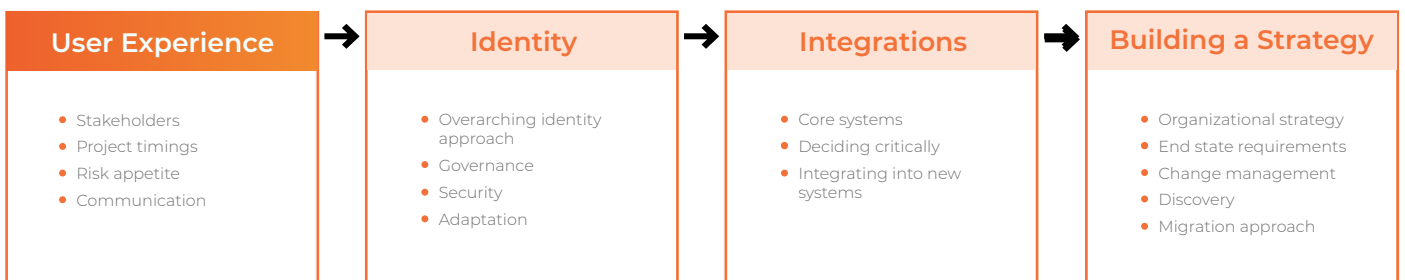
These four areas cover the considerations for the Planning phase and culminate in a defined migration strategy:



## PART 2.1

### USER EXPERIENCE

Managing the impact to user experience will undoubtedly be a primary concern in your migration - as it should! The biggest measure of success or failure in these projects is the user impact. Data may be moved correctly but if a user is not prepared for the changes or has issues at cutover (such as logging in or a policy or process change which was not communicated properly) then their perspective will be the project went poorly. To ensure this does not happen, proper stakeholder management and communication is paramount.



## Stakeholders

Different stakeholders will have their own unique needs. One may want the migration over as quickly as possible, and another will be expecting a thoroughly planned and executed migration.

- Who are the key stakeholders?
- What are their individual drivers?
- What is the overall business goal driving the migration?
- What are the business requirements?

The first part of the process is to identify and understand these needs so where possible they can be addressed and/or managed.

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## Project timings

It's not unusual to face time restraints on a business transformation project, but it is critical to ensure a strategy is built which allows for more time spent on planning and enables the acceleration of the project with completion quickly and correctly, first time.

- What are the business timelines?
- What is the project timeline?
- Are there any time or financial constraints?
- Are there any legal requirements, laws and regulations which could affect the migration?
- Are there any language, culture or time zone considerations which will affect the migration?

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## Risk appetite

What is the risk profile of the organization and the stakeholders? Every project involves risk but reducing it will save precious time and money. For example,

- Do we need to spin up a secondary environment and test an application migration first, or is the risk it does not work on day one acceptable?

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## Communication

Excellent communication with stakeholders, project champions and users mean smooth sailing! Ineffective communication during the planning phase could result in missing critical business processes from the discovery. Similarly, not communicating upcoming changes with users means they may not know how to do their jobs in the new environment. The best way to do this is to build a communications plan which maps out the messages over the course of the transformation... **ADKAR** anyone?

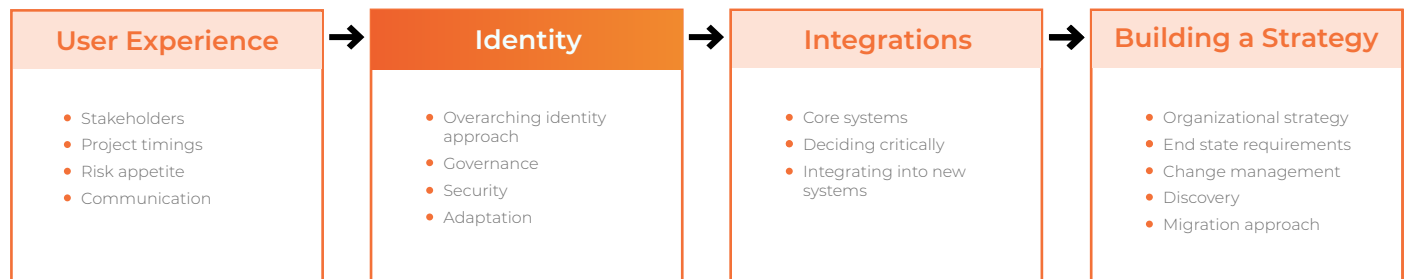
After we have done our due diligence on the user experience it is time to take this information and consider identity.



# PART 2.2

## IDENTITY

Identity is the core construct underpinning migration projects. Identity controls permissions, access to applications and data, business processes, security, and data governance. Every environment is different so our user experience inputs are critical in defining what identity will mean to the business. Here are some of the areas to understand to form a wholistic identity picture.



### Overarching identity approach

Understanding the approach for identity allows for the planning of the correct end-state first time.

- Is the approach to migrate existing accounts, create new ones, consolidate accounts or even operate with two separate accounts for a period?
- What will be the overhead and experience when making changes during a migration such as onboarding new users?

Making a mistake around identity can be extremely hard to fix during or after migration - even something small like how access is granted to resources can be tough to change. The recommended process here is to discuss and agree the approach to ensure it maps to your desired end-state.

### Security

Security is driven by identity, so it fits in well here. All relevant aspects of security which could change during the project must be addressed to reduce business impact from security oversights or breaches.

- What are the authentication requirements?
- How will distribution and mail-enabled security groups be handled?
- Which email clients and access protocols will be used?

The world has seen security incidents completely wipe out companies in recent times and in our experience, companies are still not taking security seriously enough. Multi-Factor Authentication is one of the most impactful ways to reduce security risk and we recommend this is included during a migration project.

*(Hint: Your overall IT security strategy must be carefully planned and reviewed frequently.)*

### Policies and processes

What is being moved from and to from a policy and procedure perspective? This can cover technological changes as well as fundamental process changes.

An example might be order processing where a PowerApp in the source environment might rely on a component which is not being migrated, or a policy for personal use of devices meaning traffic is logged in the new environment.

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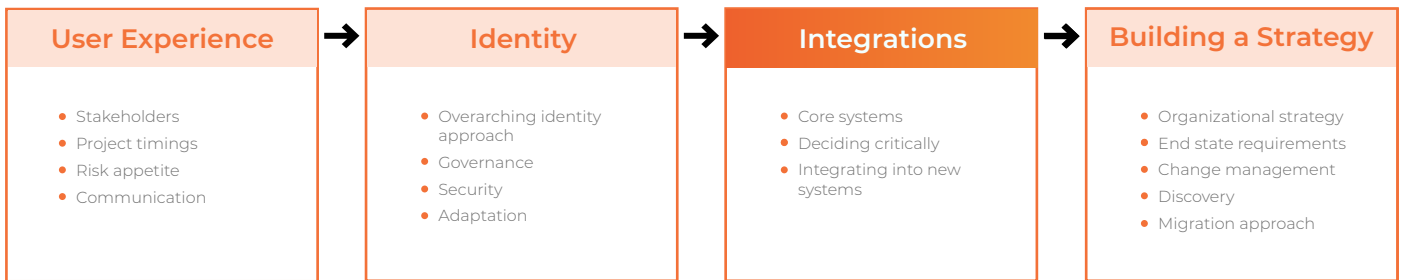
Missing a critical business process could have large implications to business operations upon completion of your migration.

# PART 2.3

## INTEGRATIONS

Once a picture of user experience and identity has been established the remit needs to be widened to include all the potential integrations. Personally, we like to talk about interferences – or potential blockers – as well. However, blockers are only blockers until they aren't!

Let's address the wider technology footprint impacted by the migration.



### Core systems

In some cases, this is very straight forward but it still needs to be documented. Examples could include a CRM system which is integrated with Microsoft 365 for authentication and emailing out to customers, or a helpdesk system which relies on a mailbox to log tickets in Exchange Online.

- Where is the data currently stored?
- How much data do you have?
- Which legacy systems or platforms (supported or unsupported) are hosting data?

### Deciding criticality

Once a list of systems is established it is important to classify them so they can be given the appropriate attention. This goes back to risk appetite which helps determine if more time and money must be spent on the validation and testing of certain systems.

### Integrating (or de-integrating) systems

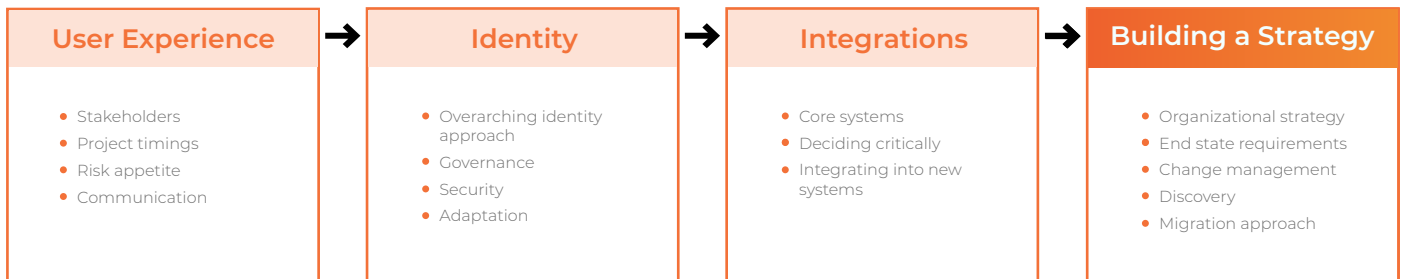
If your migration is driven by a merger, acquisition, or divestiture (MAD) then the systems in place today either need to be split, joined, or provisioned. An example might be a CRM system where one business is divesting from another. The system will have both businesses data, customers and opportunities which need to be carefully dissected to ensure the correct data is migrated.



# PART 2.4

## BUILDING A STRATEGY

The number one consideration when undertaking any complex project is to ensure a detailed strategy is in place and agreed to by all the stakeholders identified in 2.1.



Here are the main areas to consider when documenting the migration strategy:

### Organizational strategy

The strategy must suit the entire organization and for tenant-to-tenant migrations, any other impacted businesses. Documenting the correct stakeholders, risk tolerance, legal and compliance requirements or drivers is critical to ensure alignment.

### End-state requirements

Clarifying the end-state requirements is important because it represents success. The information gathered on core systems, policies and procedures, security and more can be used to ensure the requirements match expectations.

- Where should the data be moved to?
- Is the goal to migrate A to B, or A and B to C?

### Change management

Detailing the Change Management approach, communications, risks, threats, and opportunities is paramount to a successful migration project. This part of the strategy will likely be the project manager's favorite! Its main purpose is to reduce the risks associated with changes to an environment. In practice, this could be things as simple as 'external sharing won't migrate so we must communicate this' or as complicated as 'managing the data governance risk for intellectual property will be done this way.'

This information is used to determine the way to mitigate the impact of the identified issues/risks and create a detailed communication and risk management plan.

### Discovery

Documenting what has been uncovered in each of the existing environments through use of toolsets, manual discovery, workshops, and interviews ensures all data migration requirements have been captured.

Mapping this information to the end-state provides a direct relationship between what exists, the integrations discovered, and the end-state then allows for the identification of any gaps and the ability to document the relevant plans to address.

### Migration approach

This is the detail regarding the most suitable migration approach including a RACI, timelines, impacts and the actual migration process.

- What licenses will be used?
- Who will manage the migration?





# PART 3

## SUMMARY

Migrations can be complex, but careful planning and understanding of the systems involved should reduce most risks.

Key takeaways:

- Understand the business and legal requirements first and then develop a migration strategy
- Remember to always gather reports before you start the migration – it can be invaluable
- Always run test migrations to learn what the user experience will be like
- Create a communication plan so there are no surprises

If you choose to engage Insentra to manage your migration, our focus is to ensure the continuation of your business operations by seeing the migration process through end-to-end, avoiding nasty surprises, eliminating risks, and ultimately saving your organization time and money.

