

# Planning a successful Office 365 migration:

A small business checklist





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# Introduction

So you've decided to join the thousands of SMEs that have identified Office 365 as the solution to help them innovate and improve productivity. However, as tempting as it may be to jump straight in without a proper implementation plan, this is a sure-fire recipe for failure. In fact, many of our customers approach us after they have tried – and failed – to move their business to Office 365 this way.

If you want to ensure that you maximise return on investment, drive end user adoption and ensure that all the security risks have been addressed, then it is important that you follow certain steps.

Based on our own experience of implementing Office 365 for SMEs, we have put together this small business checklist to cover the main stages of a successful migration – along with helpful tips for each stage.



# Audit

As a starting point for Office 365 migration, it is vital that you take stock of your current IT systems to help identify any strengths and weaknesses, whether your environment is fit for an Office 365 set-up, and your unique user requirements.

Your audit should cover:

- Current IT infrastructure, including:
  - ☐ Servers and other hardware
  - ☐ Bandwidth availability
  - ☐ Network architecture and DNS
  - ☐ Authentication solutions
  - ☐ Directory design
  - ☐ Storage
  - ☐ Email aliases and routing rules
  - ☐ Email archiving and compliance
- Any line of business applications that may be affected
- Users and PCs joined to network
- Current security measures
- Current and anticipated storage requirements
- Discussions with end users as to existing productivity problems they encounter and the processes they believe are essential to keep

**Tip:** Taking the time to conduct an audit at this stage will ensure that critical issues are not overlooked, making for a much smoother transition – and saving time in the long run. It will also help you identify security gaps and productivity bottlenecks that need to be addressed as a matter of urgency.



# Set goals

While it is possible to realise some benefits from Office 365 simply by rolling out the software's off-the-shelf feature set, you will see a much greater return on investment by setting aside some time at the outset to consider and set goals that are specific to your business.

## **Productivity**

Using industry benchmarks and your audit feedback, identify realistic productivity savings from application features e.g. workflows, reduced administrative tasks, quicker document search times and instant collaboration.

## **Timescales and order of implementation**

- When do key milestones need to be achieved by and why?
- Will each milestone increase productivity to free up extra time for the additional IT milestones?

## **Security**

- Which security gaps do you wish to close?
- Consider identified issues, problems common to all industries and any regulatory minimum security measures you need to meet.

## **Insight**

- What level of insights do you need to see into your team's activity?
- What data reports will you need to generate for compliance purposes?

## **Collaboration**

- What level of collaboration do you require?
- Who will require access to your documents?
- How will you manage collaboration on sensitive documents?

### Nominate ownership

- Who will take ownership of the implementation?

*(Depending on the size of your business, this may be a job that requires a significant investment of hours to deliver the implementation with minimum disruption. An IT support company can often provide an external project manager if resources are not available in-house.)*

### Cost-benefit analysis

Carefully consider whether the cost and time resources needed to implement specific features will result in a great enough benefit to your business.

*(An IT support company should be able to assist you with which features offer the largest benefit: time & cost ratio, and which you may be able to do without.)*

**Tip:** Think big. Organisations are too often constrained by aligning their goals with the solutions they are aware of. If you work with an IT support company, they can often suggest solutions to problems you hadn't believed Office 365 could solve.





# The importance of end user buy-in

Research consistently shows that one of the biggest barriers to any successful IT software implementation is end user buy-in, which usually arises from lack of involvement or training. Give your Office 365 project the foundations for success by following these steps:

- ☐ Hold a stakeholder meeting to discuss key goals (as outlined in the previous section) and the implementation priorities.
- ☐ Observe end users' daily tasks and processes.
- ☐ Request input from end users as to existing productivity challenges.
- ☐ Ask for process improvement suggestions from all members of the organisation.
- ☐ Consider training needs, such as software demos and security measures.
- ☐ Ensure that the implementation process includes a feedback loop so that the software can be tweaked if necessary to ensure ease of use.
- ☐ Provide IT policy templates to help ensure your teams meet your compliance goals with minimal effort.

**Tip:** Your end users are often your biggest source of suggestions for process improvements and by involving them at the out-set you are much more likely to achieve end user buy-in.



# Identifying security needs

In our experience, security is one of the issues most often overlooked in an Office 365 implementation or migration. In many instances, businesses fail to anticipate all possible sources of data breaches (which include cyber-attacks, social engineering and human error) and often limit themselves to solutions they are already aware of. Here are some of the issues you need to consider:

- **Multifactorial authentication**

This offers higher security than a password alone by requiring users to provide two or more of the following for authentication purposes: a password, a security token (usually a passcode provided via a text message or email to an authorised address) and biometrics.

- **Email attachments**

Even with training, employees may accidentally open malicious email attachments. Guard against this by providing fool-proof security options that cannot be overridden.

- **Securing Bring Your Own Device (BYOD)**

Implement remote device wipe to protect against potential data breaches in the event a device is lost.

- **Who can view documents**

Require remote log-in to documents stored in the cloud for confidential data and documents. Set up user permissions at site level (both internal and external) for access to folders or projects.

- **WiFi / guest network**

Prevent traffic from being intercepted when documents are accessed on unsecured WiFi networks with secure cloud-based applications.

**Tip:** Human error has been identified as the single biggest security issue for many firms. [ICO data](#) from 2015 showed that the most common security risk in the legal sector was private data being sent to the wrong recipient by post, fax or email. An IT support company should be able to provide fool-proof security options to help prevent many of these data breaches.





# Migration planning

Effective planning of your roll-out will help ensure the biggest time and cost savings are delivered rapidly and with minimal disruption, thereby improving end user take-up as it will allow them to see immediate results and adapt to changes.

- **Prioritise software and features**

Identify which will provide the biggest immediate benefit: time & cost ratio, and roll out in that order.

*In our experience, the following order is usually the most effective:*

- ☐ Email (Exchange Server to Exchange Online)
- ☐ The Office suite (in order of usage)
- ☐ Cloud document storage and collaboration

- **Load sharing**

Ensure that load sharing is prioritised in order of work-related activities versus personal ones, such as sports or Facebook streams.

- **Ensure staff are advised of the planned roll-out**

**Tip:** If you attempt to implement all of the Office 365 applications at once, you may be biting off more than you can chew. The time taken to implement Office 365 is generally underestimated, especially if attempting to undertake the project in-house, and you will end up with a suite of applications that are not fully functioning and cause frustration to users. It is much better to implement in stages.



# Set-up and roll out

These steps are dependent on whether or not other steps have been completed and the order in which you have chosen to undertake the migration, but generally it is important to consider the following:

- **Configure subscriptions**

Configure your Office 365 subscription

Verify the domains you wish to use with it

- **Configure applications settings**

e.g. email, online collaboration, instant messaging, web meetings and file storage

- **Sync existing directories with server**

- **Set up single sign-on**

- **Prepare users**

Inform them of changes and how it will affect them

- **Prepare your service desk for migration**

- **Test deployment and optional migration**

Thoroughly test all aspects of the migration prior to going live.

Fix any issues identified.

- **Set up accounts and mailboxes**

- **Add users and assign the appropriate licences**

- **Migrate data (if doing so)**

Documents

Folders

Email rules

- **Validate functionality**

- **Migrate DNS settings to point to Office 365**

- **Inform users once live**

- **Test again**

Obtain feedback from users about any issues they are encountering

**Tip:** If you are attempting to implement Office 365 in-house, remember to budget for outsourcing the coding skills required to transfer files and existing rules/systems across, as this is not simple code that can be copied from online forums. (Day rates are typically £1,000 per day.)

## Training and support

If you wish to avoid your employees becoming frustrated with Office 365 (leading to inevitable push-back) and contributing to security risks through human error, then training is essential. Moreover, if you want a seamless process where any issues that arise are fixed without disruption to your business, then the right ongoing support is a must.

- ☐ Set up on-boarding and security workshops
- ☐ Provide IT policy templates
- ☐ Ensure employees can quickly highlight issues that they encounter with software
- ☐ Consider 'new world' support which provides different mediums to highlight problems
- ☐ Provide a forum for general software questions and collate and circulate FAQs
- ☐ Ensure any IT support meets your security, business continuity and regulatory compliance needs

*e.g. 24x7x365 support, security hotlines, business continuity planning and ISO27001 2005*

**Tip:** Workshops help ensure that employees undertake the training, instead of placing manuals into a 'to do' list that never gets done. They also provide workers with an understanding of software processes so that they can problem-solve any issues in the future – not just replicate learned steps



# What to look for in an IT support company

For many SMEs, it is much more cost-effective to outsource their Office 365 migration once specialist technical expertise, time resources and the potential for business disruption are factored in. However, in order to maximise your results when working with an IT support company, you should look for certain qualities as a minimum:

- ❑ A strong track history, with excellent references
- ❑ Thorough initial auditing and planning, which looks at your existing business processes and advises of the best way to prioritise the implementation to meet your goals
- ❑ Process and user training on-boarding
- ❑ Experience of integrating Office 365 with your line of business applications
- ❑ Thorough security risk training to protect against human error - the biggest threat to a businesses' security
- ❑ Comprehensive 24x7x365 IT support, so that you can focus on your business, confident that all your company's IT support needs are covered
- ❑ A high Service Level Agreement standard with a guaranteed uptime and continuity protection that meets the needs of your business
- ❑ UK based data centres, or at least full Safe Harbour compliance if data is stored outside the EEA – helping you meet many industry's regulatory minimum data protection measures
- ❑ Application of a cloud service that adheres to ISO27001 2005 as a minimum security standard
- ❑ Additional security services to maximise security, such as private cloud, mobile device wiping and zero knowledge' encryption services, where the provider does not store the password for you
- ❑ Critical device monitoring, so that a proactive and timely approach is taken in the event that there is a security breach



# About Doherty Associates

Doherty Associates has a proven track record in providing flexible, secure office 365 cloud solutions which save time and enhance productivity.

We are also on hand to help you day and night, with a dedicated team to monitor your system 24/7 to ensure business continuity.

Trust and confidentiality is an important requirement for many businesses and mirrored in how Doherty Associates build our relationships. Just ask any of our customers, who would be only too happy to provide a reference.

“ Doherty’s offers fast response times delivered to Service Level Agreements (over 95% within 1 hour) – so you can get on with the legal business at hand. ”

## Key services we offer include:

### Comprehensive IT support


- 24x7 fully managed service desk
- Log and track tickets with Doherty support app
- Unlimited service desk access – no hidden costs
- Remote diagnostics for quicker resolution
- Fully managed desktop Anti-malware included
- Regular patching to keep you safe
- Mobile device support, including remote wipe technologies

### Critical device monitoring

- 24x7 proactive server monitoring
- Office 365 and Azure services monitoring
- Fully managed server patching
- Firewall & ISP monitoring and management
- 3<sup>rd</sup> party vendor liaison
- Emergency on-site support for priority one incidents
- Malware monitoring and alert response

### Deskside training clinic

- On ramp education sessions to get you started
- Tips and advice for safer computing
- Power use sessions going beyond the basics
- Smarter working tips, so that you know what to use and when
- Ask Me sessions



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