



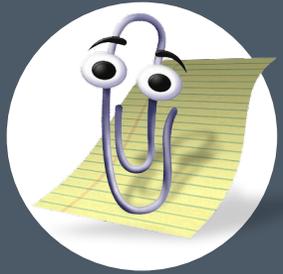
# Accelerate Office 365 Success: How to Best Plan, Manage and Control Migration Projects

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Dux Raymond Sy  
@meetdux | AvePoint  
Microsoft RD + MVP





# Activity: Migration Pictionary

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## *Individual Activity*

1. Get three sticky notes
2. List a SharePoint migration issue on each sticky note

## *Group Activity*

1. Consolidate your list of issues
2. Identify the top three issues
3. Draw these three issues on the white board with no words

Expand beyond the traditional measure of success to ensure mission success

Framework

Select and apply a relevant migration framework

Success Criteria

Project Management

Develop an effective & practical project management process

Identify necessary resources to plan, deploy, and support

Implementation

Governance & Adoption

Meet organizational needs and promote lasting buy-in

# Collaboration today



Everyone has  
a Voice



Access from  
Anywhere



Everyone is a  
Contributor



# Look Familiar?



Office 365  
Throttling Limits



Many Content  
Sources



Do I need to migrate everything?



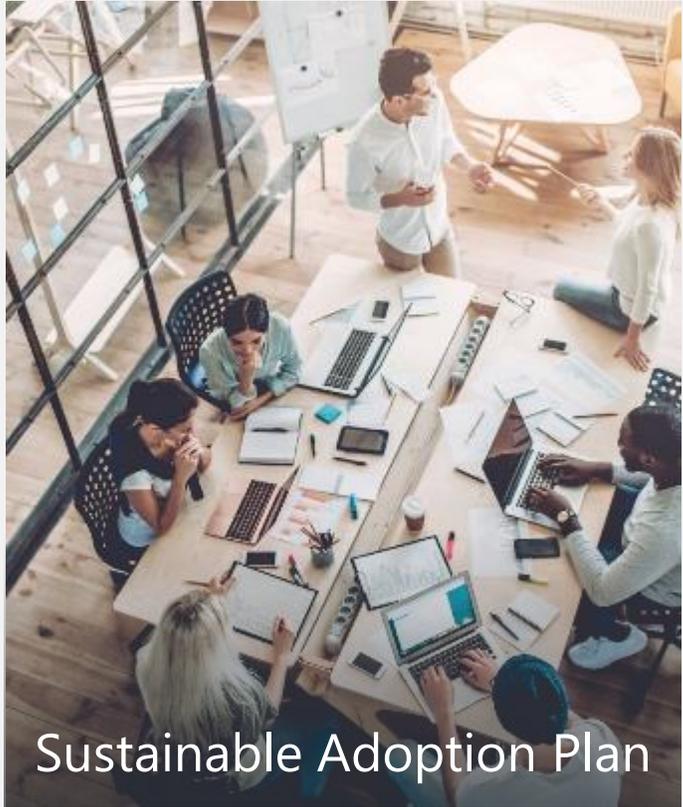
Lack of Migration Experience



SharePoint  
Customizations



Data  
Governance  
& Classification



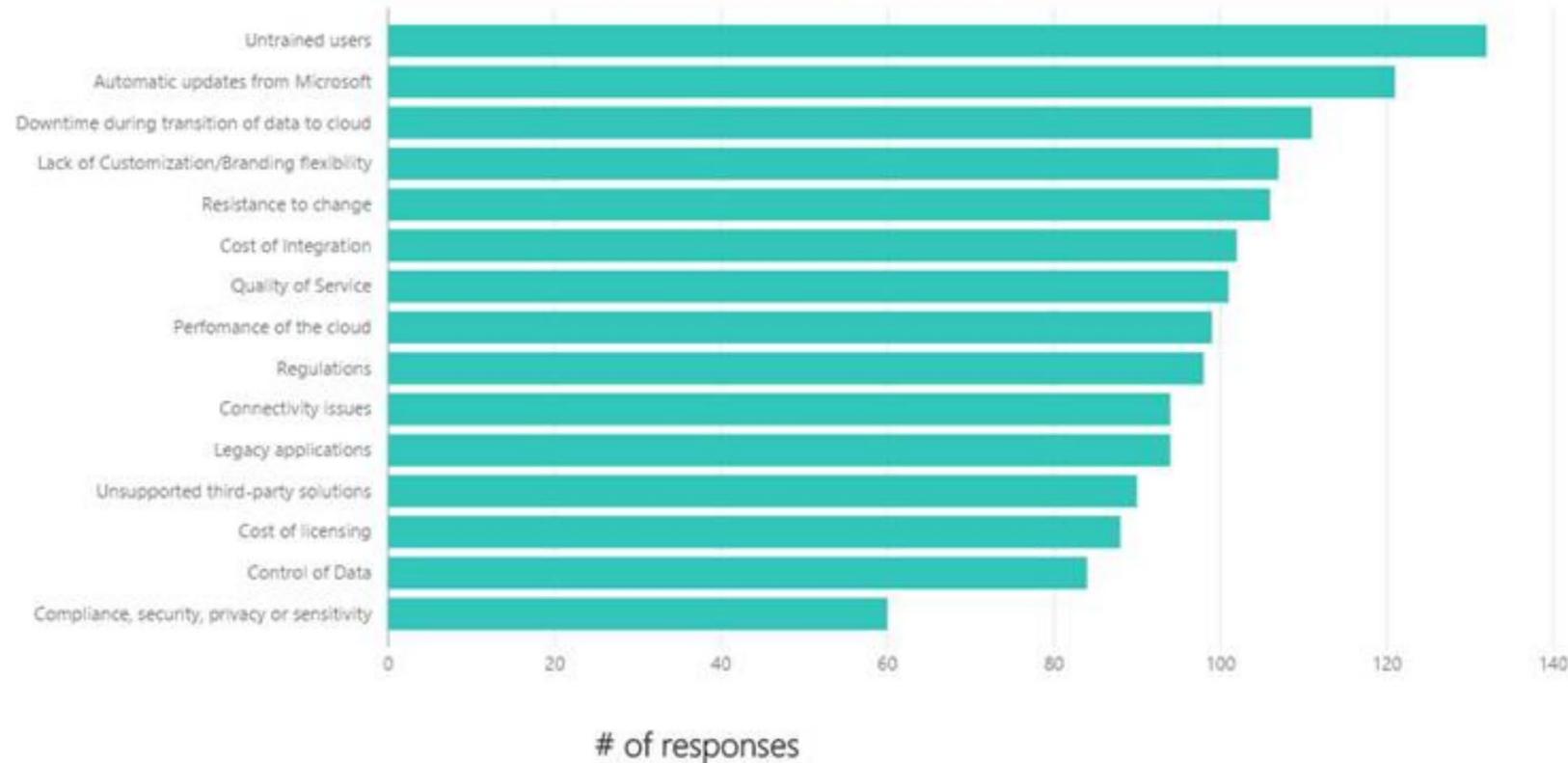
Sustainable Adoption Plan



# Migration Challenges

- 28% of organizations still have investments on SharePoint 2010
- 37% of SharePoint market share is Office 365
- 88% of companies, 34% within 3-5 years, are Hybrid
- No direct migration path
- 50% either are using or will acquire migration tools in the next 12-18 months

## Moderately Concerned



# 5 Steps to Accelerate Success



Define Success  
Criteria

Execute  
Migration

Develop  
Project Plan

Facilitate  
Sustainable  
Adoption



# Establish Migration Framework

1



**Look Familiar?**

# Migration Options

Migrate Everything

Selective Migration

Pre Migration Cleanup

Post Migration Cleanup

## Considerations

Speed to completion?

Total duration?

Speed to kick-off?

Risk upon migration?

Cost of project?

Client permission?

Regulations & Compliance?



# Migration Framework

**Phase 1** Migration Discovery, Assessment, and Planning

**Phase 2** Information Architecture and Governance Planning

**Phase 3** Pilot Migration

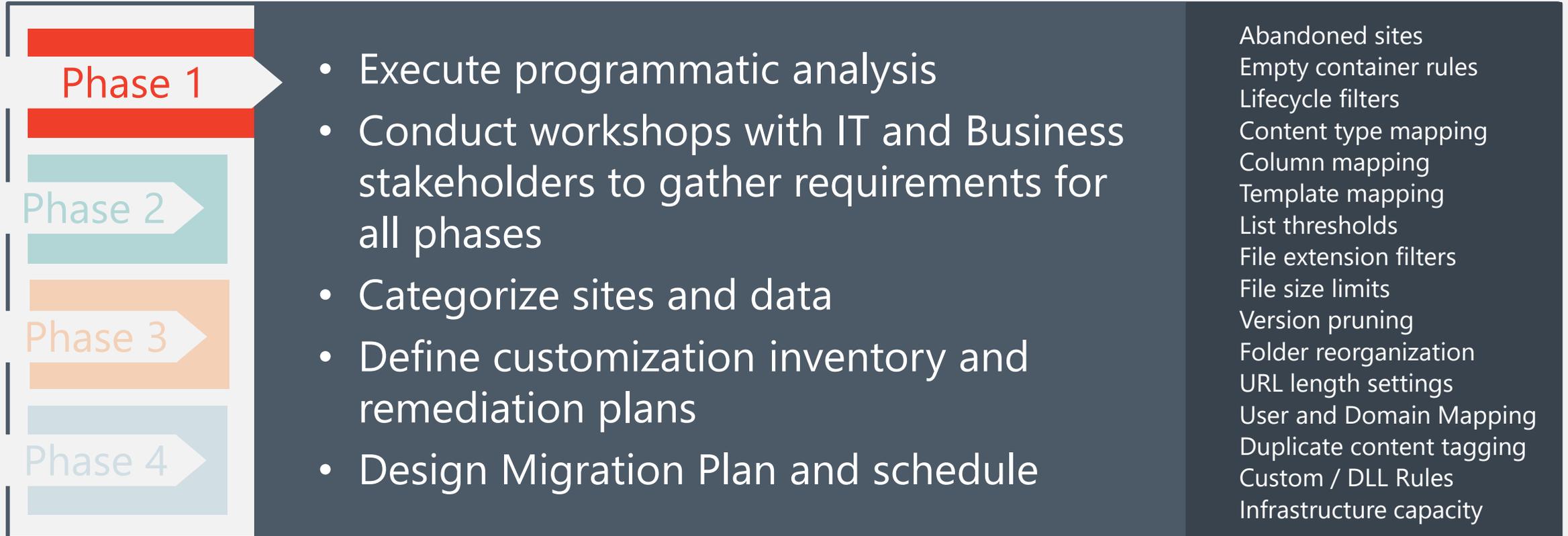
**Phase 4** Migration Execution

## Comprehensive Migration Plan

- IA & Governance framework will help avoid “sprawl”
- Pilot confirms validity of the plan and provides insight into potential roadblocks
- Iterative Migration Execution will focus first on high priorities and quick wins



# Migration Discovery, Assessment, & Planning

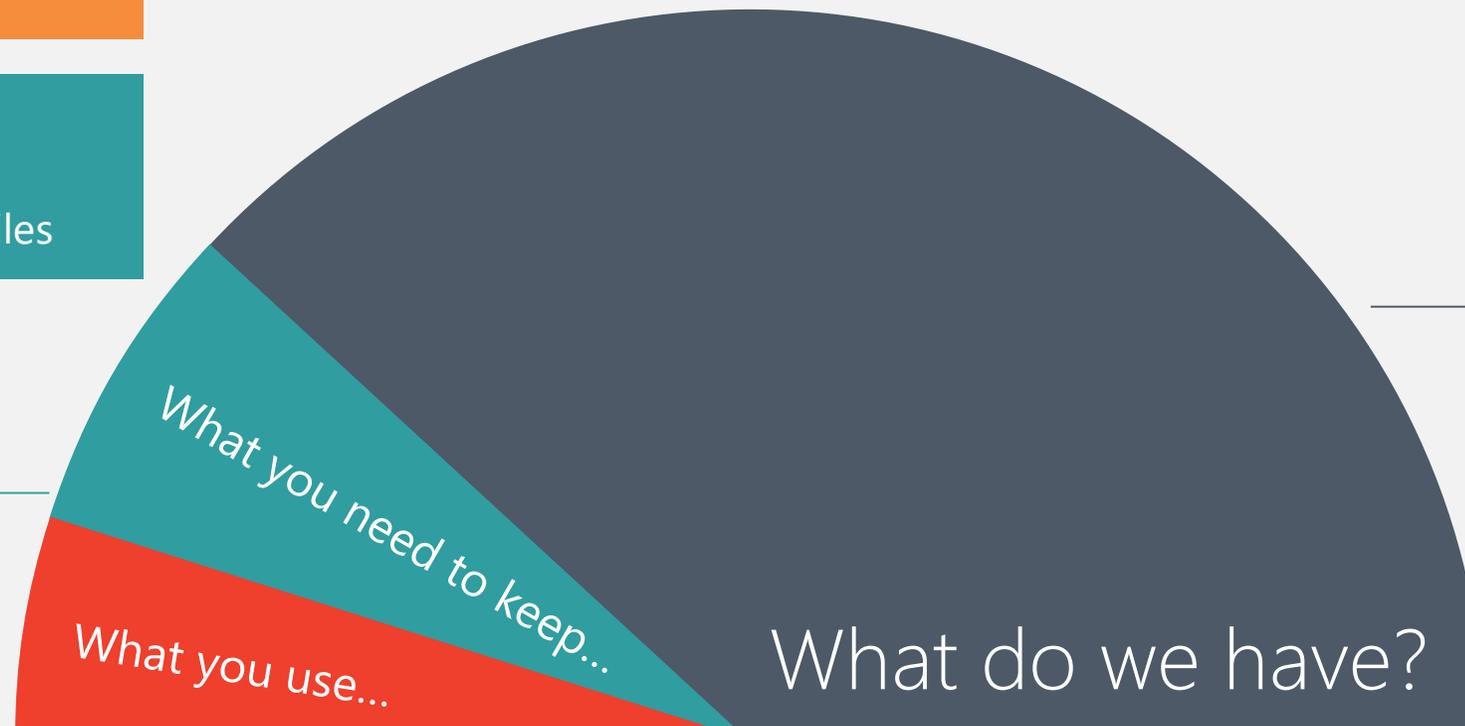


# Data Discovery Challenge

- Current project files
- Current reference docs

- Client records
- Employee records
- Previous project files

Dark Data



# Tenants of Data Discovery



Where is it?



File Share



SharePoint



Office 365



Database



What is it?

## File Level Analysis



- Redundant, outdated and trivial (ROT) data
- File types (Music, log files, etc.)

## Content Level Analysis



- Sensitive data
- Date Created
- Owner



Who can access it?



Who owns it?



Who can read it?



Who can edit it?



# Example: Duplicate File Report

Command Panel	No.	File name	Extension	Path	Created time	Modified time	Last Access time	Size	Owner
<b>Find Master File:</b>	1	DocumentView3270.pdf	.pdf	\\contoso\share\Departments\Eng	2015-06-22-03:45:40:823	2012-11-20-15:58:16:000	2015-06-22-03:45:40:823	30734641	AVE\spadmin
<b>Which properties should be based on?</b>	1	DocumentView3270.pdf	.pdf	\\contoso\share\Departments\Eng	2015-06-22-03:45:43:497	2012-11-20-15:58:16:000	2015-06-22-03:45:43:497	30734641	AVE\spadmin
Created time	1	DocumentView3270.pdf	.pdf	\\contoso\share\Departments\Fin:	2015-06-22-04:01:40:843	2012-11-20-15:58:16:000	2015-06-22-04:01:40:843	30734641	AVE\spadmin
<input type="button" value="Tag Master Files"/>	2	DocumentView3015.pdf	.pdf	\\contoso\share\Departments\Fin:	2015-06-22-04:01:40:843	2012-11-20-16:17:38:000	2015-06-22-04:01:40:843	156449	AVE\spadmin
	2	DocumentView3015.pdf	.pdf	\\contoso\share\Departments\Eng	2015-06-22-03:45:43:497	2012-11-20-16:17:38:000	2015-06-22-03:45:43:497	156449	AVE\spadmin
	2	DocumentView3015.pdf	.pdf	\\contoso\share\Departments\Eng	2015-06-22-03:45:40:823	2012-11-20-16:17:38:000	2015-06-22-03:45:40:823	156449	AVE\spadmin
<b>filter and fill in action</b>	3	bupers imo command brief 08 nov 12.pp	.ppt	\\contoso\share\Departments\IT\	2015-06-22-04:02:07:230	2012-11-29-13:07:50:000	2015-06-22-04:02:07:230	2107904	AVE\spadmin
<b>please use filter to find the files you need and fill in the Action and Action parameter, like Delete, Move (with parameter).</b>	3	bupers imo command brief 08 nov 12.pp	.ppt	\\contoso\share\Departments\Fin:	2015-06-22-04:01:39:937	2012-11-29-13:07:50:000	2015-06-22-04:01:39:937	2107904	AVE\spadmin
	3	bupers imo command brief 08 nov 12.pp	.ppt	\\contoso\share\Departments\Eng	2015-06-22-03:45:39:870	2012-11-29-13:07:50:000	2015-06-22-03:45:39:870	2107904	AVE\spadmin
	3	bupers imo command brief 08 nov 12.pp	.ppt	\\contoso\share\Departments\Eng	2015-06-22-03:45:42:713	2012-11-29-13:07:50:000	2015-06-22-03:45:42:713	2107904	AVE\spadmin
	3	bupers imo command brief 08 nov 12.pp	.ppt	\\contoso\share\Departments\Eng	2015-06-22-03:45:45:433	2012-11-29-13:07:50:000	2015-06-22-03:45:45:433	2107904	AVE\spadmin
	4	DocumentViewe8c2.pdf	.pdf	\\contoso\share\Departments\Eng	2015-06-22-03:45:43:823	2012-11-20-17:25:02:000	2015-06-22-03:45:43:823	228976	AVE\spadmin
	4	DocumentViewe8c2.pdf	.pdf	\\contoso\share\Departments\Eng	2015-06-22-03:45:41:120	2012-11-20-17:25:02:000	2015-06-22-03:45:41:120	228976	AVE\spadmin
	4	DocumentViewe8c2.pdf	.pdf	\\contoso\share\Departments\Fin:	2015-06-22-04:01:41:093	2012-11-20-17:25:02:000	2015-06-22-04:01:41:093	228976	AVE\spadmin
	5	Bold Alligator Articles 08FEB2012.doc	.doc	http://contoso/Shared Documents,	2015-01-20-02:17:58:000	2015-01-20-02:17:58:000	2015-01-20-02:17:58:000	94720	
	5	Bold Alligator Articles 08FEB2012.doc	.doc	\\contoso\share\Departments\Fin:	2015-06-22-04:01:39:907	2012-11-30-09:53:18:000	2015-06-22-04:01:39:907	93184	AVE\spadmin
	5	Bold Alligator Articles 08FEB2012.doc	.doc	\\contoso\share\Departments\Eng	2015-06-22-03:45:39:823	2012-11-30-09:53:18:000	2015-06-22-03:45:39:823	93184	AVE\spadmin
<b>Export files to list</b>	5	Bold Alligator Articles 08FEB2012.doc	.doc	\\contoso\share\Departments\Eng	2015-06-22-03:45:42:667	2012-11-30-09:53:18:000	2015-06-22-03:45:42:667	93184	AVE\spadmin
<b>Path of Duplicate Detector:</b> <input type="button" value="Browse"/>	6	djrs_prfl_v2.docx	.docx	\\contoso\share\Departments\Eng	2015-06-22-03:45:43:463	2012-11-20-22:22:24:000	2015-06-22-03:45:43:463	29903	AVE\spadmin
Duplicated.Document.Detector.Cmd.exe	6	djrs_prfl_v2.docx	.docx	\\contoso\share\Departments\Eng	2015-06-22-03:45:46:230	2012-11-20-22:22:24:000	2015-06-22-03:45:46:230	29903	AVE\spadmin
	6	djrs_prfl_v2.docx	.docx	\\contoso\share\Departments\Eng	2015-06-22-03:45:46:417	2012-11-20-22:22:24:000	2015-06-22-03:45:46:417	29921	AVE\spadmin
	6	djrs_prfl_v2.docx	.docx	\\contoso\share\Departments\Eng	2015-06-22-03:45:40:793	2012-11-20-22:22:24:000	2015-06-22-03:45:40:793	29903	AVE\spadmin
<b>Path of configuration profile:</b> <input type="button" value="Browse"/>	6	djrs_prfl_v2.docx	.docx	\\contoso\share\Departments\Fin:	2015-06-22-04:01:40:827	2012-11-20-22:22:24:000	2015-06-22-04:01:40:827	29903	AVE\spadmin
Profile.xml	6	djrs_prfl_v2.docx	.docx	\\contoso\share\Departments\IT\	2015-06-22-04:02:07:353	2012-11-20-22:22:24:000	2015-06-22-04:02:07:353	29903	AVE\spadmin
	6	djrs_prfl_v2.docx	.docx	http://contoso/Discovery/djrs_prfl	2015-09-16-10:29:30:000	2015-09-16-10:29:30:000	2015-09-16-10:29:30:000	29903	
<input type="button" value="Perform Action"/>	6	djrs_prfl_v2.docx	.docx	http://contoso/Shared Documents,	2015-01-20-02:22:31:000	2015-01-20-02:22:31:000	2015-01-20-02:22:31:000	35210	
	6	djrs_prfl_v2.docx	.docx	http://contoso/Shared Documents:	2015-03-18-01:56:41:000	2015-03-18-01:56:41:000	2015-03-18-01:56:41:000	32671	
	7	CSR-Form-08-11-055.xls	.xls	\\contoso\share\Departments\IT\	2015-06-22-04:02:07:337	2012-11-29-11:13:52:000	2015-06-22-04:02:07:337	168960	AVE\spadmin
	7	CSR-Form-08-11-055.xls	.xls	\\contoso\share\Departments\Fin:	2015-06-22-04:01:40:797	2012-11-29-11:13:52:000	2015-06-22-04:01:40:797	168960	AVE\spadmin
	7	CSR-Form-08-11-055.xls	.xls	\\contoso\share\Departments\Eng	2015-06-22-03:45:40:747	2012-11-29-11:13:52:000	2015-06-22-03:45:40:747	168960	AVE\spadmin
	7	CSR-Form-08-11-055.xls	.xls	\\contoso\share\Departments\Eng	2015-06-22-03:45:46:213	2012-11-29-11:13:52:000	2015-06-22-03:45:46:213	168960	AVE\spadmin



# Source System Scans

## SITE TEMPLATE REPORT



This report identifies sites that have custom site templates. Last modified date can also be selected to filter out potential sites that have been abandoned to prioritize further investigation.  
- MySite exclusion criteria set (page level filter)

### Web Application Name

- Select All
- (Blank)
- SharePoint - 80
- SharePoint - extcollab.avepoint.net443

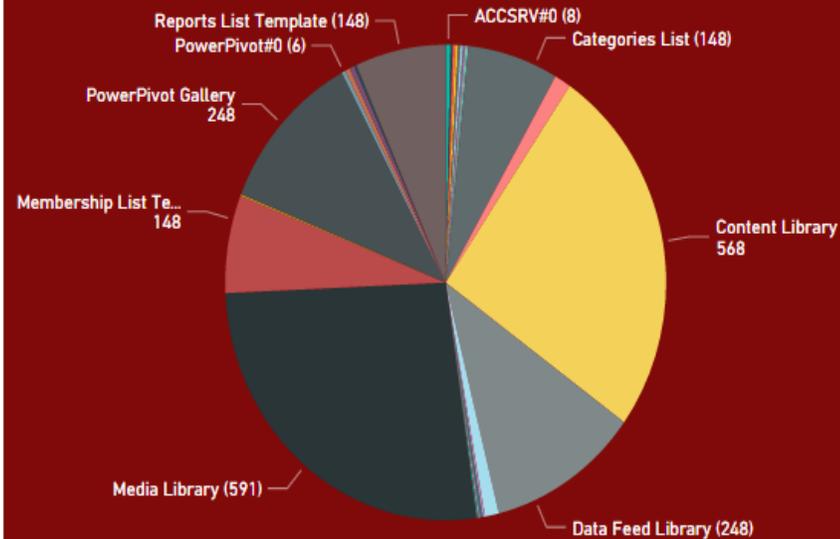
### Site Collection Name

- Select All
- (Blank)
- https://extcollab.avepoint.net/customers/AARP
- https://extcollab.avepoint.net/customers/ACT Migration
- https://extcollab.avepoint.net/customers/ACT SP Design Project
- https://extcollab.avepoint.net/customers/AFCENT
- https://extcollab.avepoint.net/customers/AIG
- https://extcollab.avepoint.net/customers/Alstom Migration
- https://extcollab.avepoint.net/customers/andy\_a
- https://extcollab.avepoint.net/customers/andy05132016

### Template Name

- Select All
- ACCSRV#0
- ACCSRV#1
- ACCSRV#3
- ACCSRV#4
- ACCSRV#5
- ACCSRV#6
- Announcements
- App Catalog List Template
- App Requests List Template
- Apps for Office Catalog List Tem...
- Carousel News
- Categories List
- Configuration
- Content Library
- Data Feed Library
- File Share Links
- GuideList
- Idea Stream Campaign#0
- Idea Stream Campaign#1

### Template Distribution



### Template Type

- Select All
- List
- Site

### Number of Templates

2234

### Distinct Templates

33



# What do You Need to Secure?

## Regulated Data

- Data that requires retention / long-term archives
- ITAR/export controlled data
- Gold copies or replication

## Sensitive Data

- "Controlled Unclassified Information" (CUI)
- PII / PHI / PCI data about employees / citizen

## Classified Data

- Operational security (OpSec)
- Intellectual Property
- Classified documents

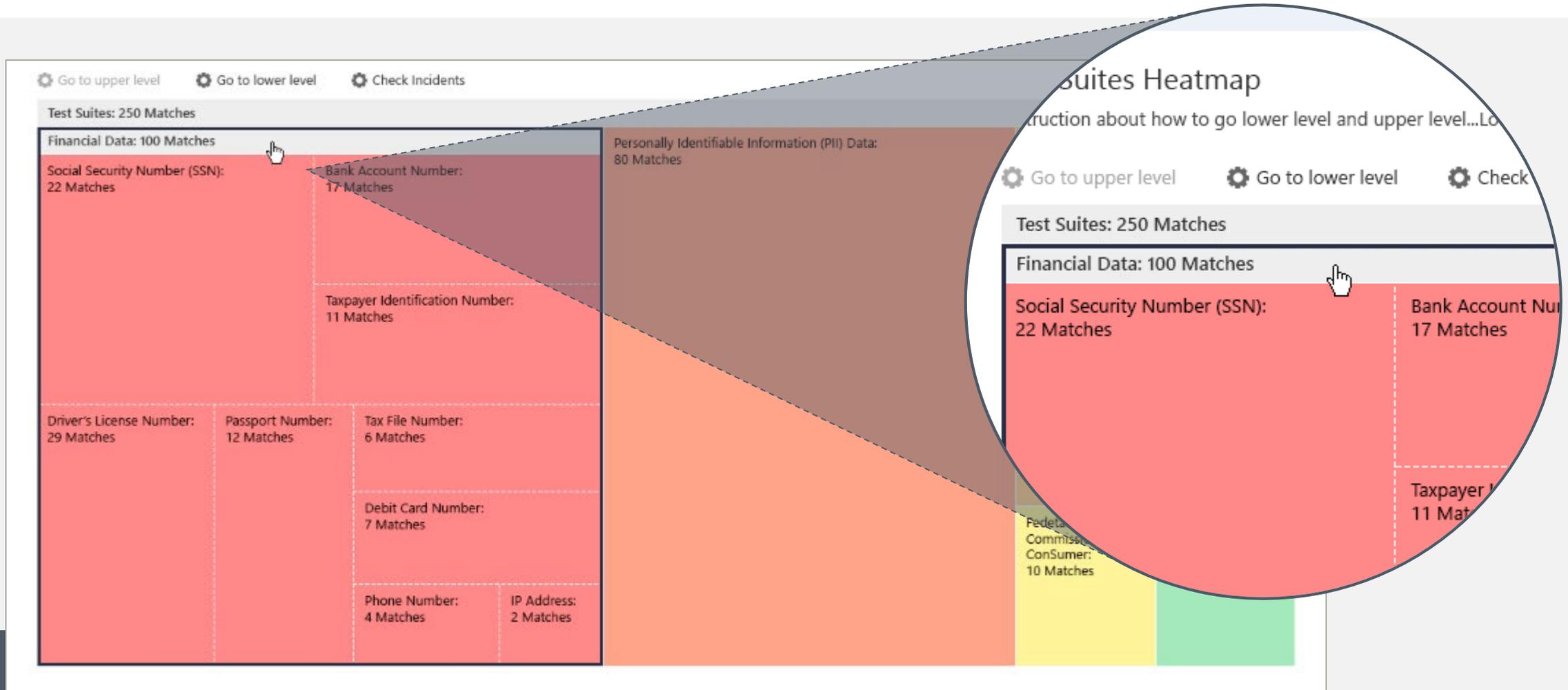
## Fines & Prosecution

## Fines & Loss of Reputation

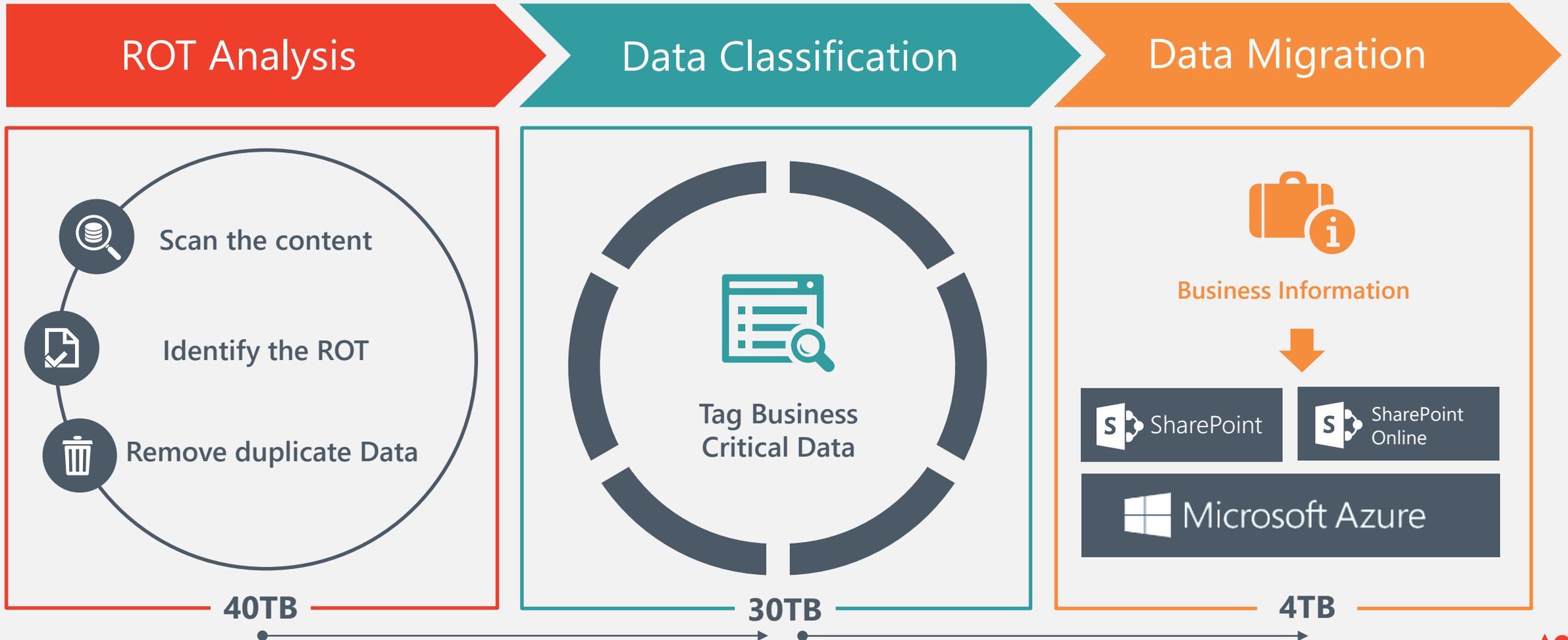
## Security / Business Drivers



# Example: Heat Map of Sensitive Data



# Pragmatic Migration Approach



# Migration Design Workshops



- Pruning and exclusion criteria
- Rules that define the file size, URL limitations to be applied during the migration project
- Scheduling and orchestration of migration
- Content reorganization
- Content classification and tagging guidelines
- Permission guidelines
- Optimal migration architecture (e.g. use of Azure Infrastructure vs. Local Services, HSM vs. CSOM, Database Migration, etc.) necessary to complete the project



# Migration Design Considerations



**Data Classification (analysis based on age, size, source, etc.)**

**Classification Based on Ownership**

**Site & Content Classification (for SharePoint only)**

**Classification Based on Complexity**

**Classification Based on Ability to Migrate**

**Customization Inventory (for SharePoint source content only)**

**Data Migration Rules & Migration Profiles**

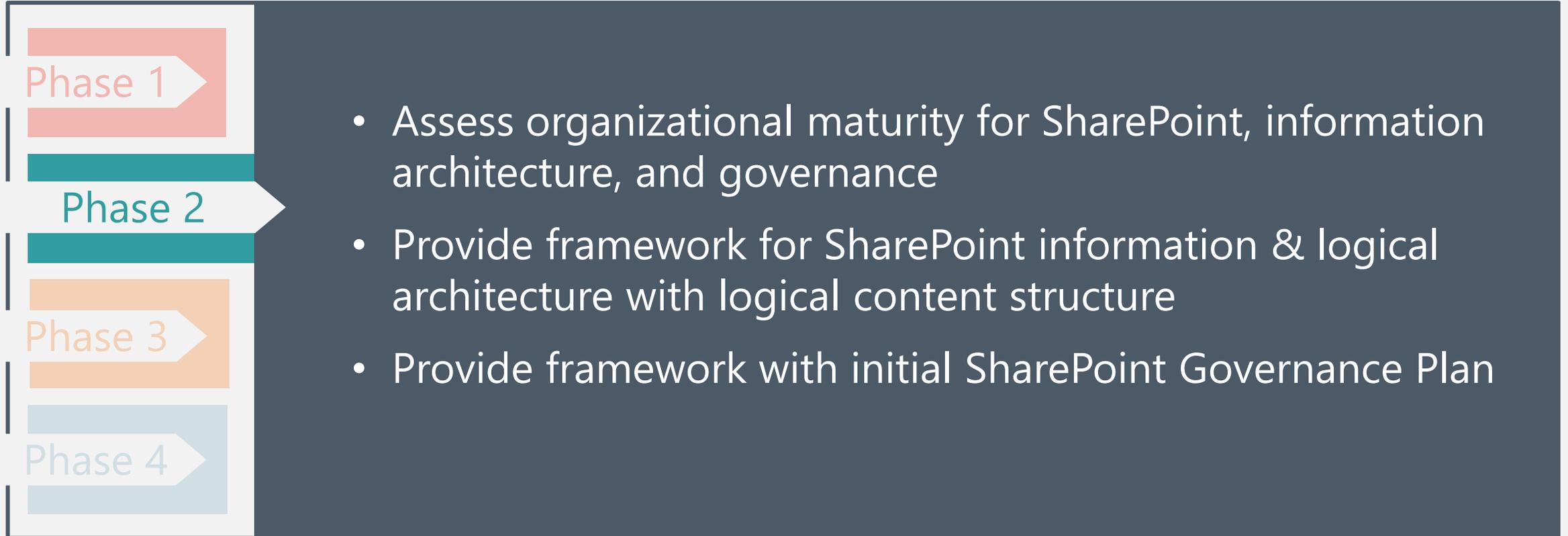


# Source Complexity

Complexity Type	Description
<b>Tier A</b> <i>Low complexity</i>	No customization or customization has equivalent SharePoint or Office 365 functionality
<b>Tier B</b> <i>Medium complexity</i>	Customization that can be easily be ported as part of migration e.g. SharePoint built-in workflows, custom content types etc.
<b>Tier C</b> <i>High complexity</i>	Customization that requires “re-development” before migration to new environment



# Information Architecture & Governance Planning



# Taxonomy

Internal Level

Conventional  
ad-only

Internal Concepts

London

Disc Board

Contribute

Site Cat

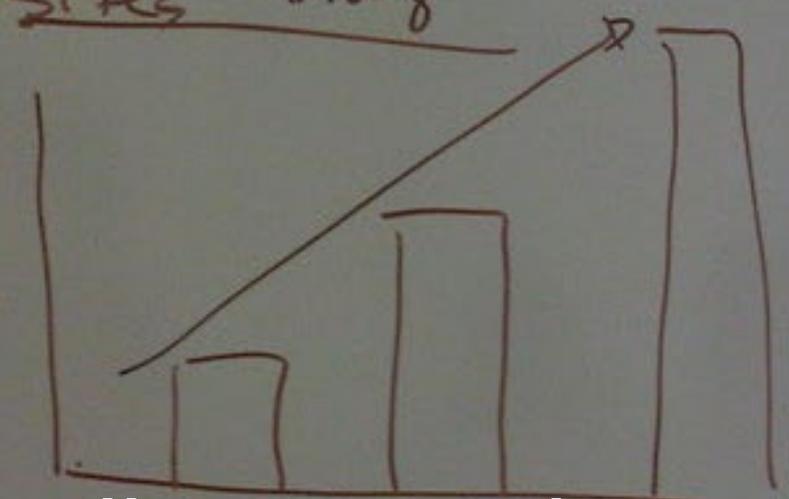
Site

List/Item

# Taxonomy

- ① Site Taxonomy
- ② Information Taxonomy
- ③ User Taxonomy

# Sites Taxonomy



Formal / Informal  
Permanent - Project - ...  
- Rept

# Governance Site

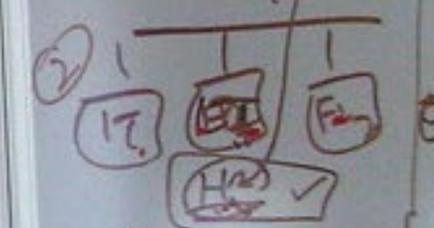
# INFO TAXONOMY

- ① Referential
- ② Collaboration  
- Internal

HR Man

# Referential ①

Collaboration



- Permissions
- Groups
- P.L.

List/Item

Contribute

Lightning Talk: How do you establish IA?

# Workshops, Planning, & Stakeholder Engagement

## Representative Stakeholder Analysis

IT knows technology and business understands their needs; we bring them together to create strategies that represent the global organization and achieve your critical mission.

## Prioritization and Planning

We prioritize technical capabilities matched with business use cases to define plans that ensure long-term success across the global organization and identify quick-wins to gain traction.



Governance & Compliance

Taxonomy & IA

Infrastructure & Office 365

# Make Governance Relevant



# Governance is Not Just a Document



Integrated with overall business and IT governance

Roles and responsibilities

What's in it for me?

Living, breathing process



# Governance Focus for Office 365



For collaborative workspaces, need to govern:

How they are  
requested, approved  
and created

*Provisioning*

How availability,  
compliance and  
changes over time are  
managed

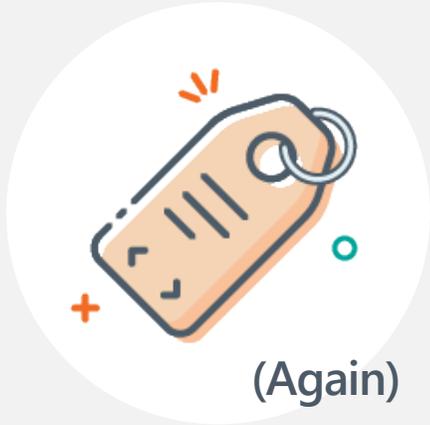
*Management*

Retention, expiration  
and disposal

*Lifecycle*



# Infrastructure Design Considerations



Data Classification (analysis based on age, size, source, etc.)

Classification Based on Ownership

Site & Content Classification

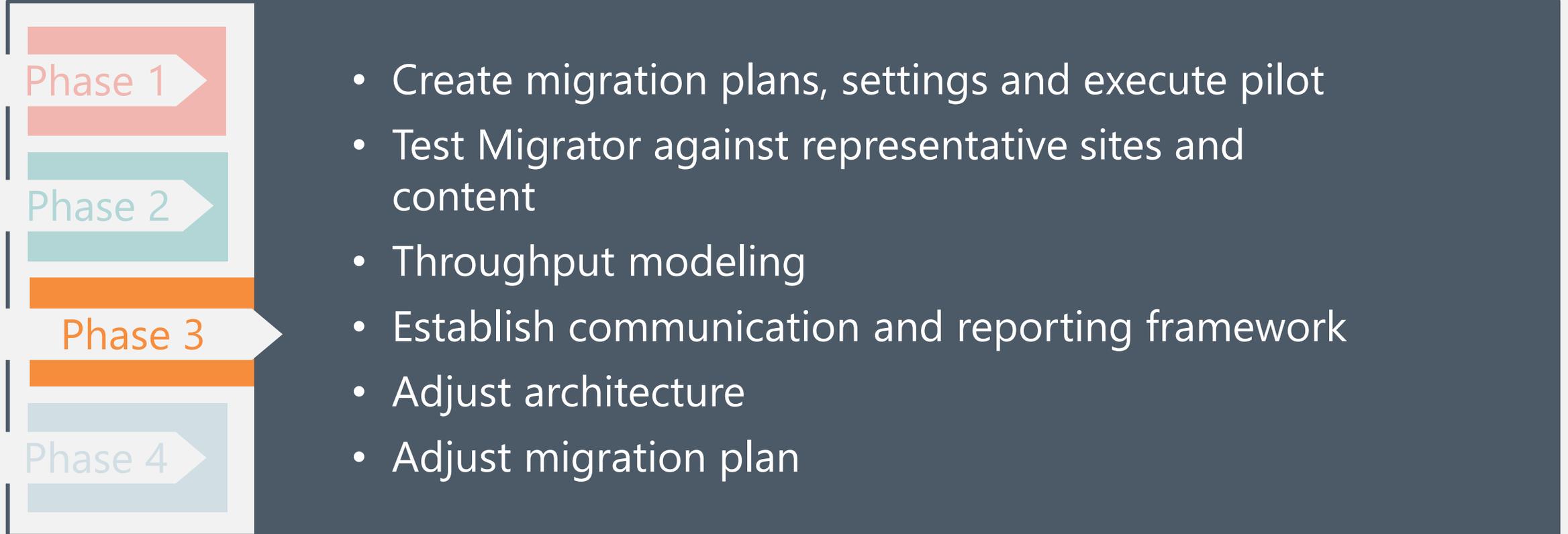
Classification Based on Complexity

Classification Based on Business Needs

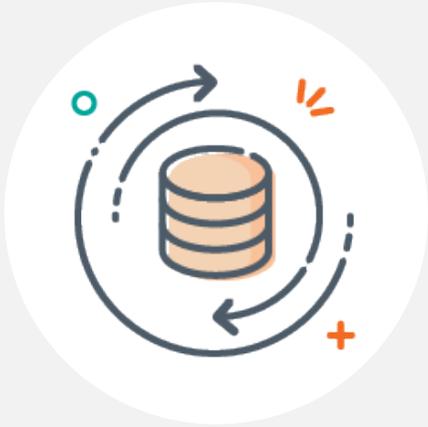
Classification Based on Governance Needs



# Pilot Migration



# Pilot Activities



Create & execute a series of pilot migrations for each of the source systems

Validate the migration design profiles

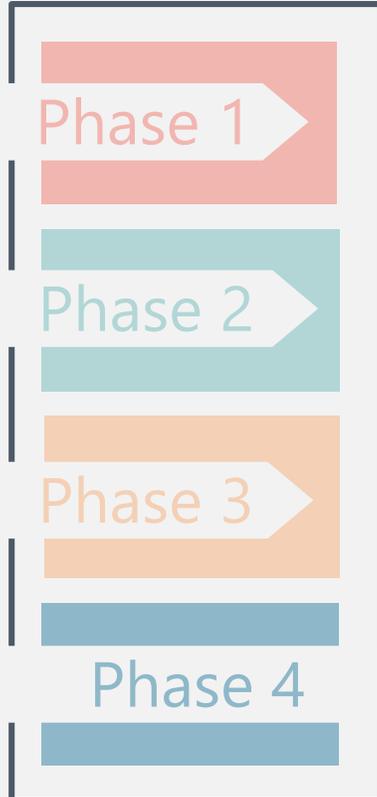
Review results with a small group of users (UAT)

Confirm & adjust migration architecture based on performance analysis

Validate any tools, scripts or dependencies simulate user acceptance process with a before & after snapshot of a sample



# Migration Execution



- Migration execution following iterative release plan
- Customization remediation (optional)
- Compliance scanning (optional)
- Data validation and User Acceptance
- Post migration remediation



# Migration Wave

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## Sprint / Wave Methodology and Framework

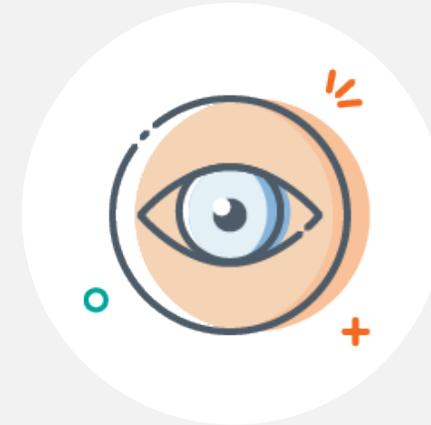
- Execute migration activities
- Manage schedule, issue and progress reporting via PBI Framework
- Track audit failure reports
- Track offshore progress
- Coordinate issue reporting and remediation
- Negotiate New Feature Requests and understand when to execute support tickets



# Migration Validation



Compare object counts between source and destination



Spot check pages, metadata, permissions, webparts, etc.



# Incremental Migration



- Address migration variance
- Set source to *ready only* once incremental migration is completed



# Environment Cut Over



Announce to Team

Make Training on the new environment available

Promote schedule to users

Implement in phases if necessary



# Migration Framework

**Phase 1** Migration Discovery, Assessment, and Planning

**Phase 2** Information Architecture and Governance Planning

**Phase 3** Pilot Migration

**Phase 4** Migration Execution

## Comprehensive Migration Plan

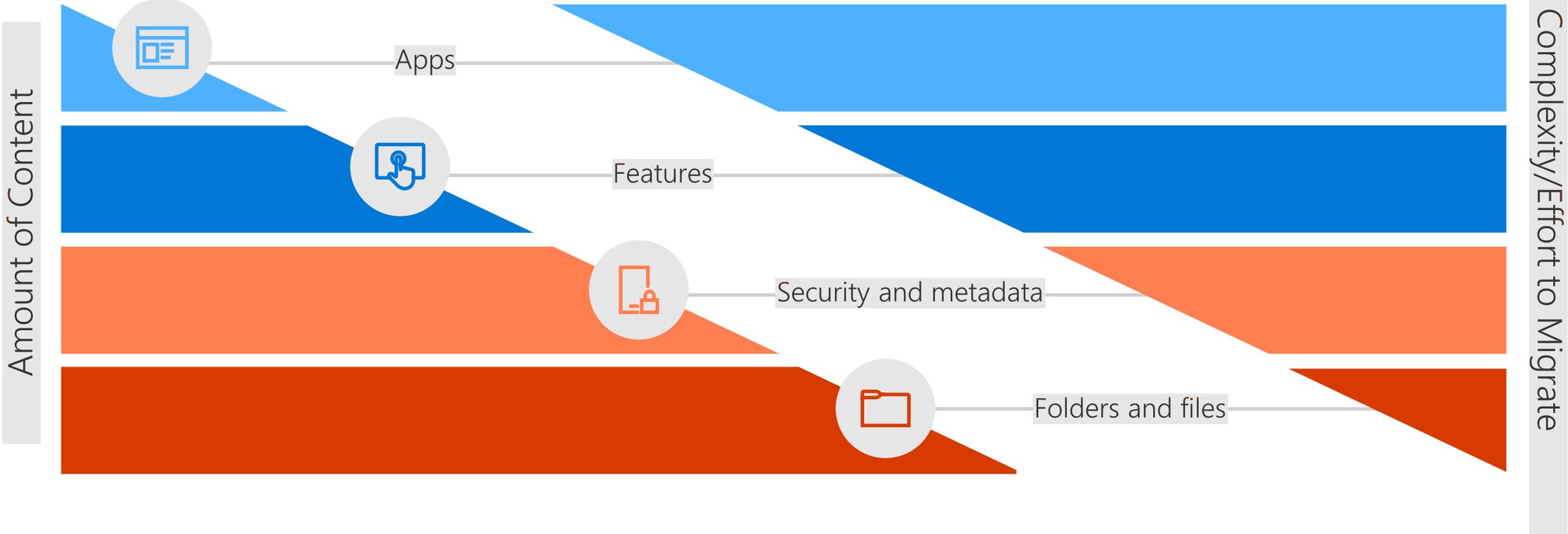
- IA & Governance framework will help avoid “sprawl”
- Pilot confirms validity of the plan and provides insight into potential roadblocks
- Iterative Migration Execution will focus first on high priorities and quick wins



# Migration Tools Spectrum

Each migration has unique needs

Your assessment will help you determine what tool is right for you



# SharePoint Migration Tool

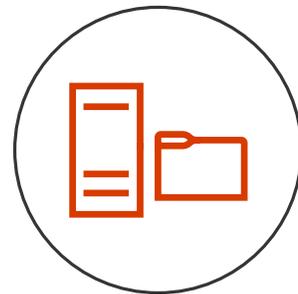
## Simple, and fast content migration solution

Migrate content from SharePoint 2013/2016/2019 document libraries and file shares to SharePoint or OneDrive in Office 365

Available for all Office 365 customers @  
<https://go.microsoft.com/fwlink/?linkid=861555>



# FastTrack migration to OneDrive and SharePoint



Free migration benefit for Office 365 customers

Content assessment

Planning and preparation guidance

Content migration

Testing and support

Infrastructure and licensing  
included at no cost

Full service descriptions

<https://go.microsoft.com/fwlink/?linkid=861556>



# Third-party migration tools



## Discover

Before you migrate, identify required, relevant, and sensitive content, and ditch the rest. Find out which customizations may impact your plans, and eliminate potential risks.



## Migrate

Move data to the cloud or the latest SharePoint version, automatically or on a schedule. Whether you migrate in bulk or bit-by-bit, we'll keep it together, and won't impact users



## Monitor

Keep an eye on your migration process. Responsive monitoring, customizable reports, and content validation make it easier to ensure your project is on schedule and on point.

# Compliant Migration



Discover

Analyze

Cleanse

Destroy



Tag

Classify

Secure

Migrate

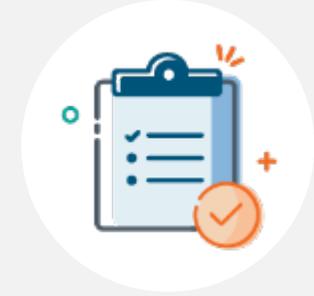


Enable

Connect

Integrate

Automate



Record

Archive

Dispose



# Make it Happen

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Make the framework work for  
you to ensure migration success

- Define Success Criteria
- Develop Project Plan
- Execute Migration
- Sustainable Adoption



# Define Success Criteria

2



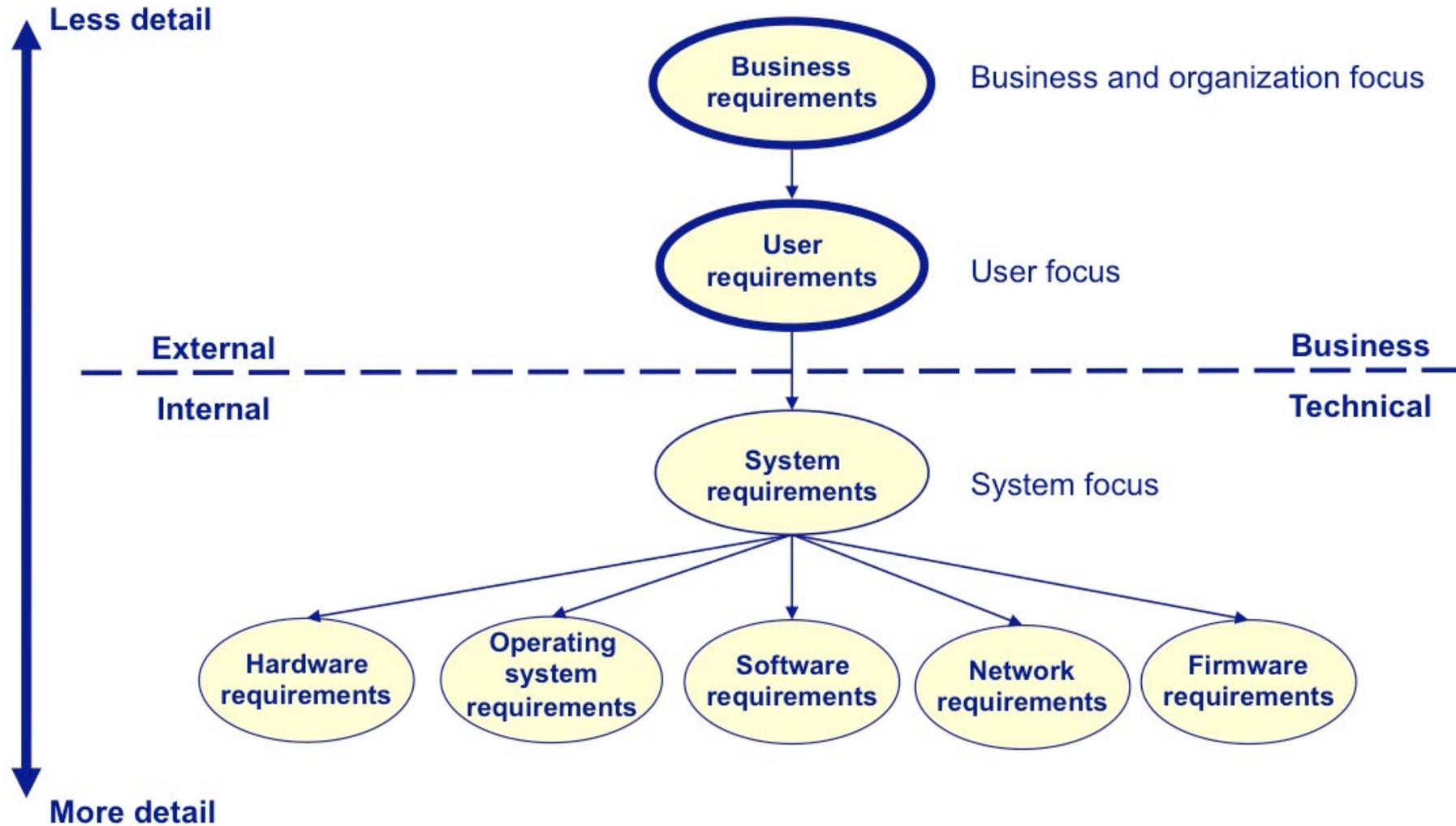
8 5 4 9 1 7 6 3 2 0

Office 365

8 5 4 9 1 7 6 3 2 0

Eight Five Four ..... Two Zero

# What is Office 365 to You?



# Traditional Success Criteria



## Executives

### BUDGET

- Did we come in under the estimated budget?
- Did we incur any feed from missing regulatory requirements?
- Do we have any new operational expenses?

### Time

- Did we meet our timeline?



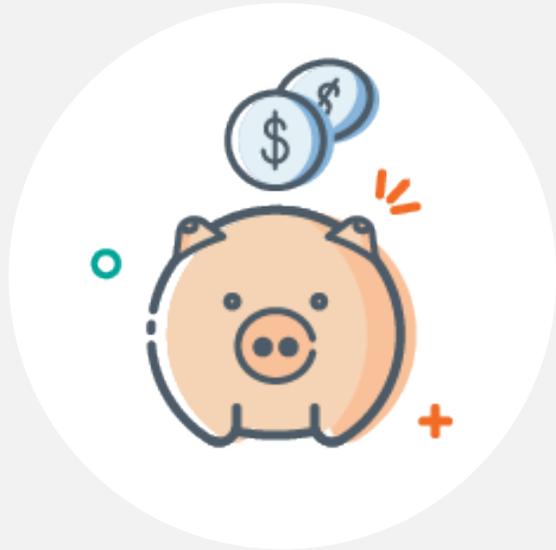
## IT

### Technology

- Are we leveraging the new environment to its fullest capabilities?
- Are we able to off-board the old tool?



# Business Matters, Migrations Don't



Financial Gains

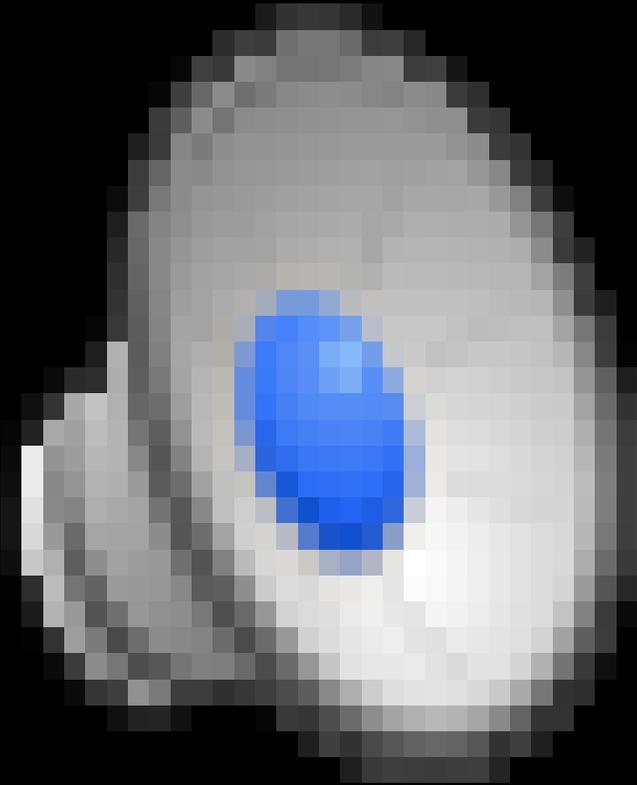


Expedite Innovation



Customer Success

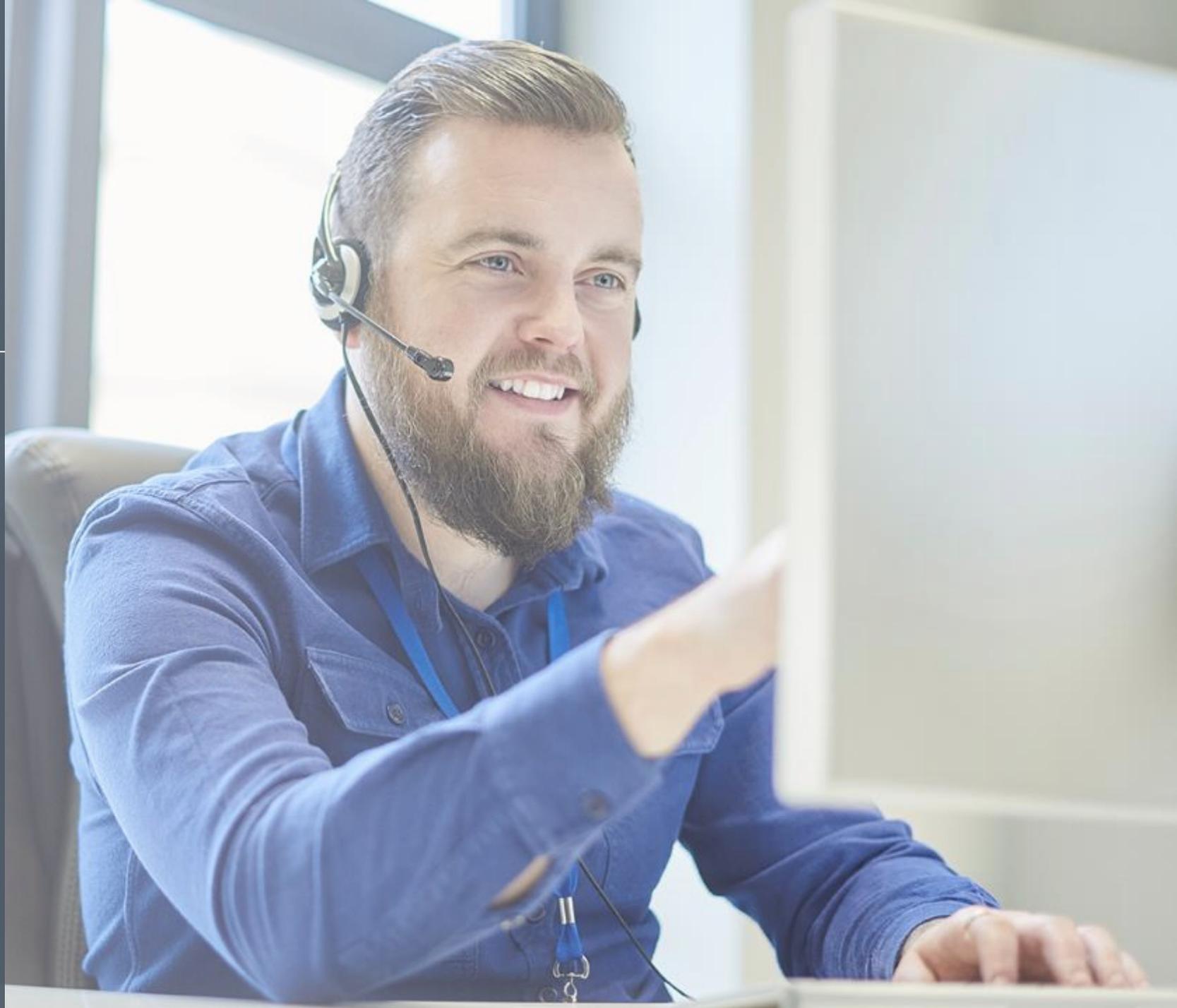




# The New Role of IT: A Business Enabler

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- Work with the business to identify needs
- Translate technology into business value
- Map capabilities into a solution



# From On-Premises to the Cloud



**The Conversation Has Shifted**



**Market Trend**

A red square containing a white icon of a cloud. Below the icon, the text "Market Trend" is written in white.

**Data Governance**   **Compliance**



**Investment Priorities**

A dark blue square containing two white icons: a cluster of three interlocking gears on the left and a padlock on the right. Below the icons, the text "Investment Priorities" is written in white.

**CapEx**   **OpEx**



**Spending Shift**

An orange square containing a white icon of a server rack on the left, a white arrow pointing to the right, and a white cloud icon on the right. Below the icon, the text "Spending Shift" is written in white.

**Business Concerns**

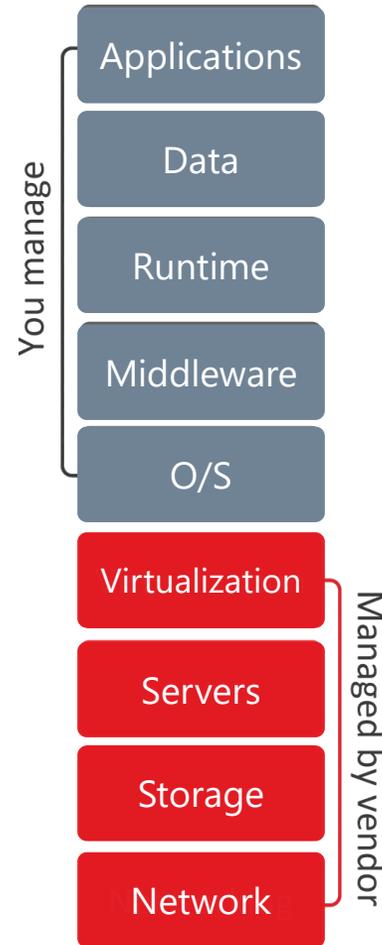
A gray square containing a white icon of a person in a business suit. Below the icon, the text "Business Concerns" is written in white.

# “WIIFM” – What’s In It for Me?

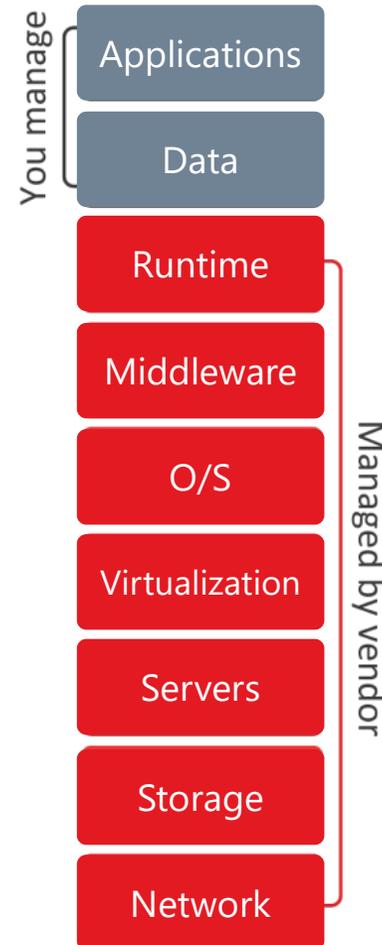
If you’re moving to the cloud, what does success look like for the end user?



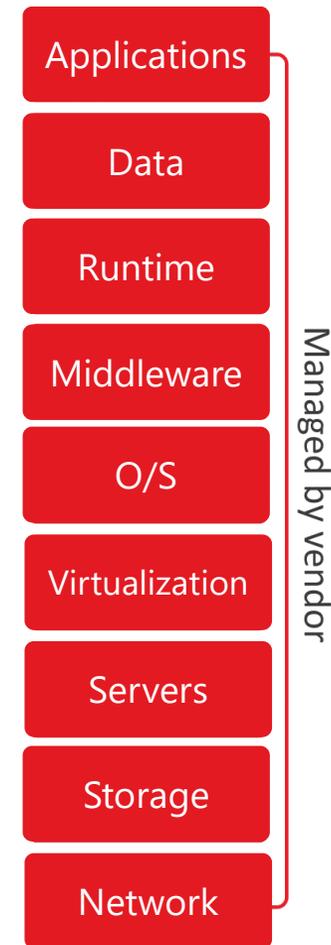
# Cloud Service Layers



IaaS

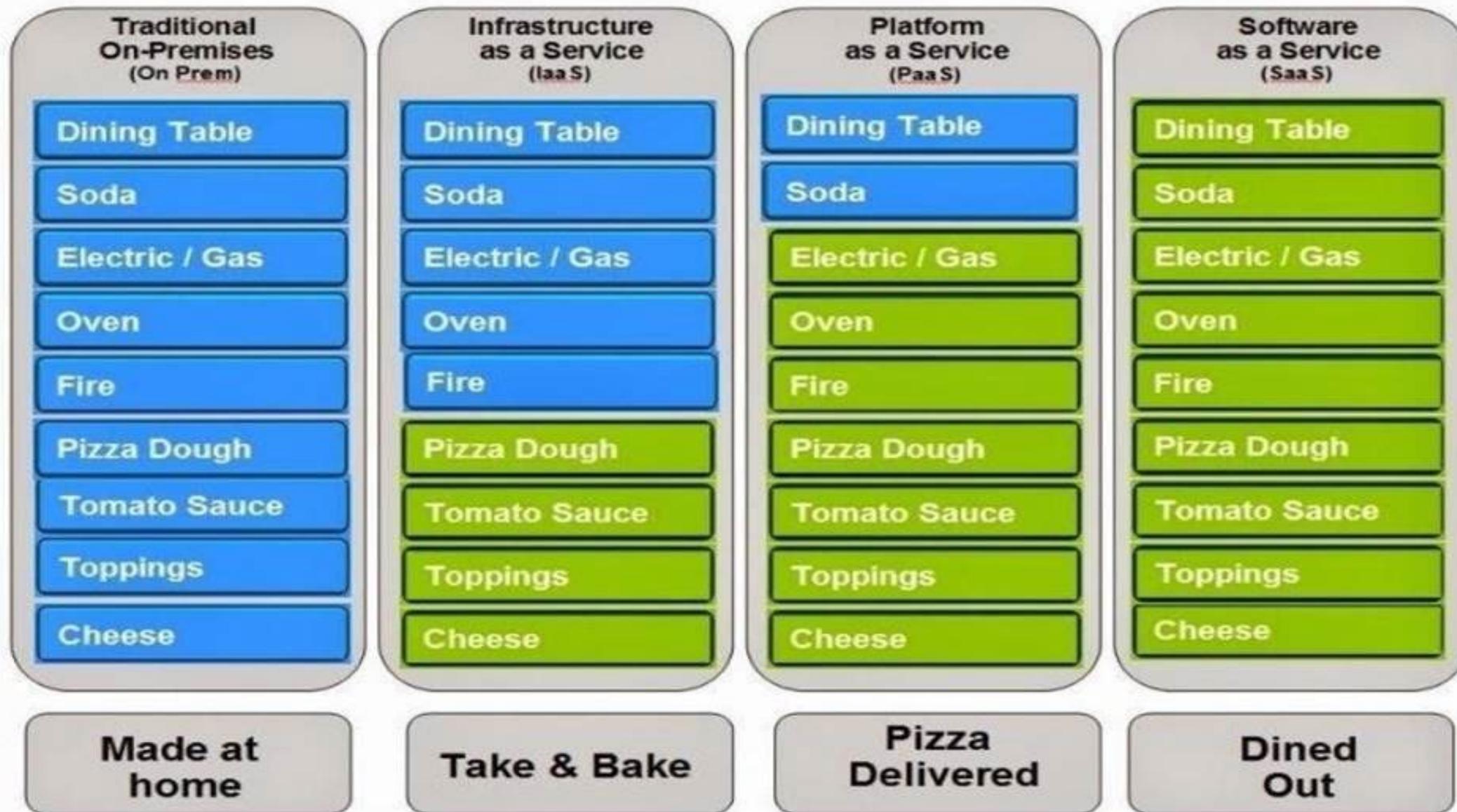


PaaS



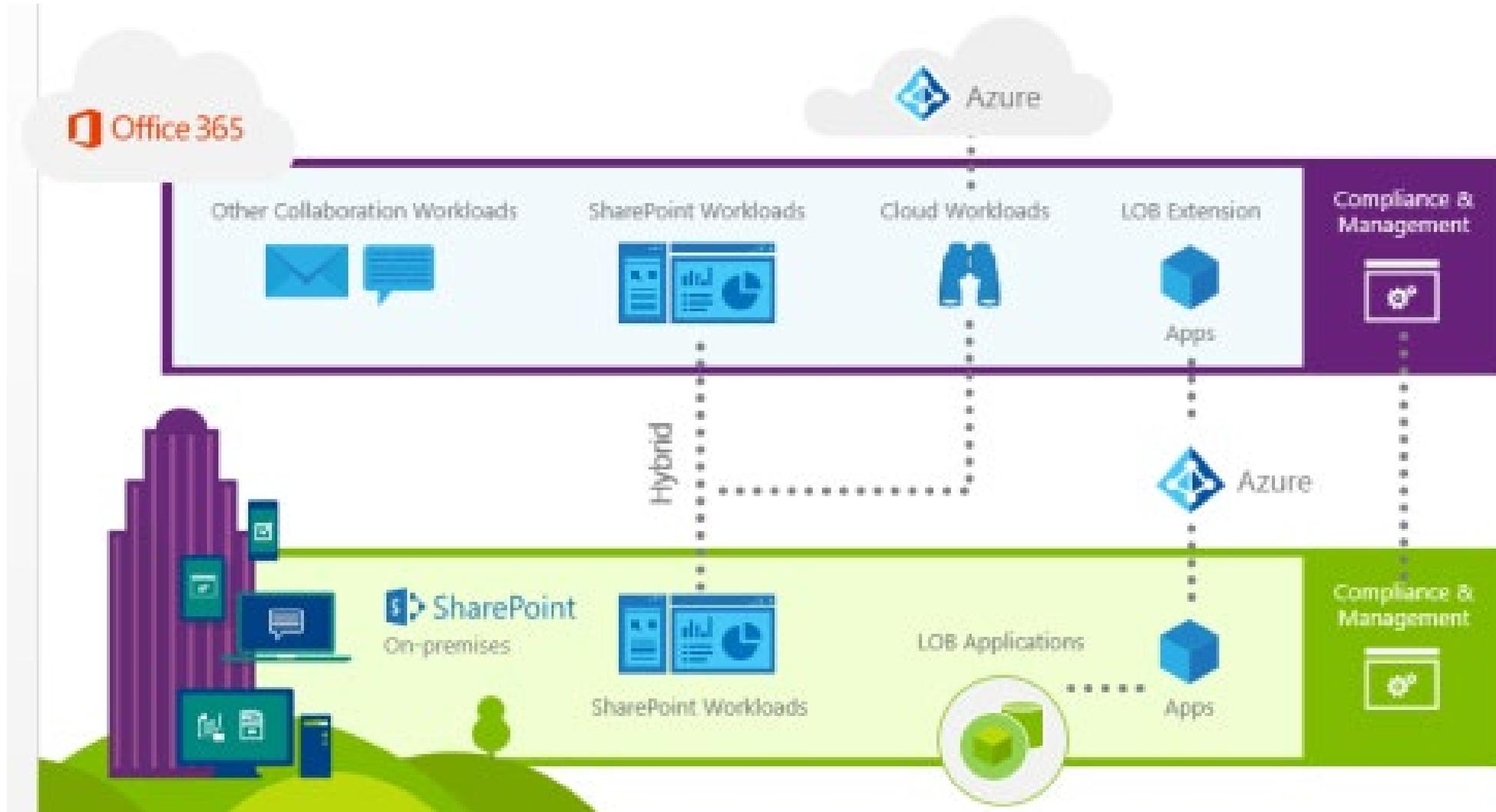
SaaS

# Pizza as a Service



■ You Manage    ■ Vendor Manages

# Implementation Scenarios



# What is hybrid?

Hybrid provides connective tissue between SharePoint on-premises and Office 365

A single pane of glass for discovering and managing content and people



# Why choose hybrid



Anywhere access and  
business insights



Extend your capacity  
and capabilities



Unified management  
and compliance

**40%**

SharePoint Server customers  
use one or more hybrid  
scenarios

**5x**

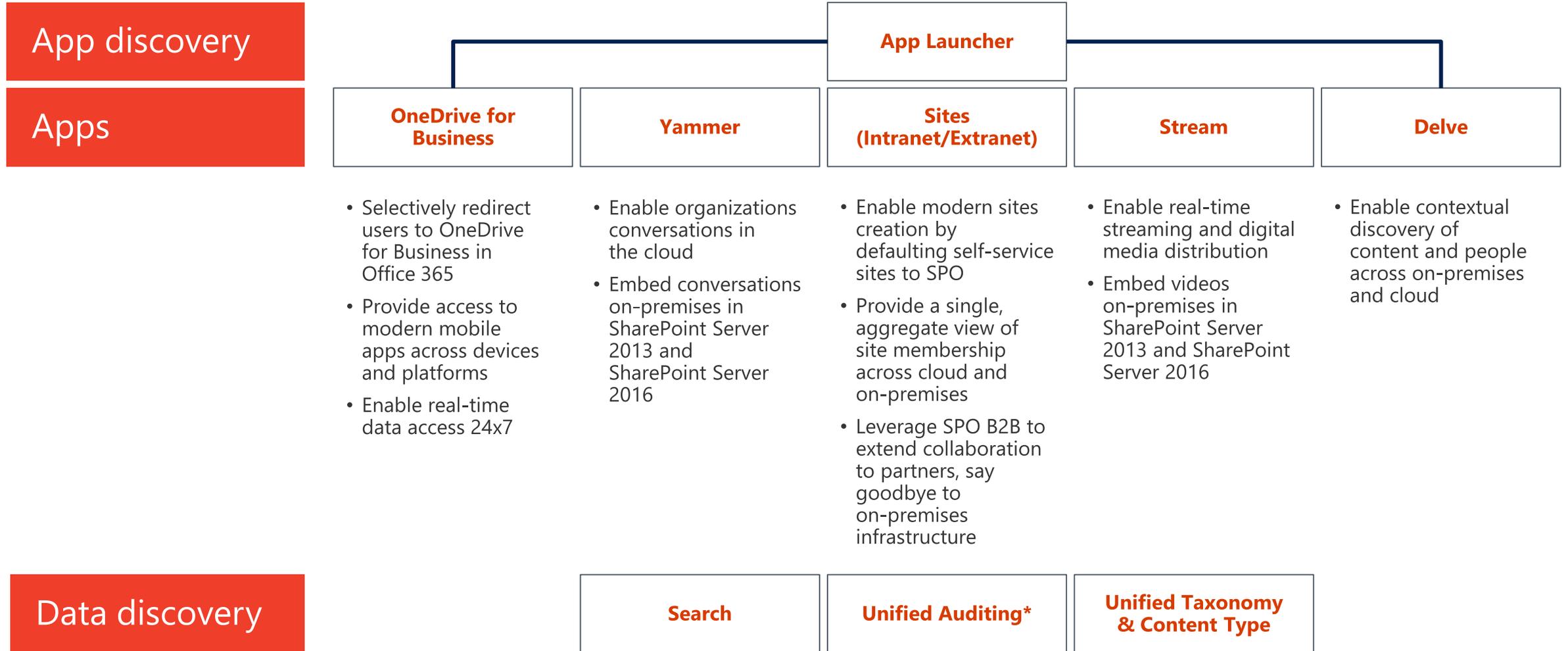
Higher usage of cloud services  
when adopting a hybrid scenario

Ease access and discovery through  
cloud available experiences and data  
aggregation with solutions spanning  
on-premises and cloud environments

Get the scale and innovations in  
the cloud without exhausting your  
on-premises infrastructure

Leverage existing investments  
and tooling across on-premises and  
cloud rather than re-creating policies  
and retraining staff.

# The scope of hybrid capabilities...



# New Success Criteria



## Executives

### BUDGET

- Did we come in under the estimated budget?
- Did we incur any feed from missing regulatory requirements?
- Do we have any new operational expenses?

### Time

- Did we meet our timeline?



## IT

### Technology

- Are we leveraging the new environment to its fullest capabilities?
- Are we able to off-board the old tool?



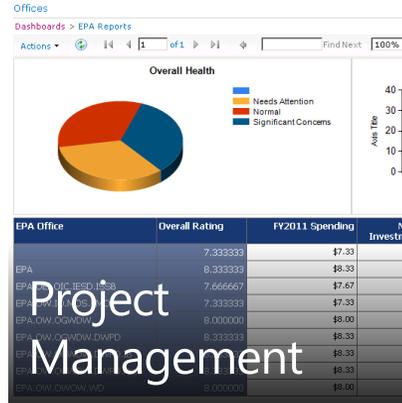
## End Users

### Business

- Do I understand how this new environment will enhance my business
- Do I have the resources to quickly learn and engage?
- Do I understand where to go to get my job done?
- How will this help me accomplish our mission?



# "Get My Work Done" Platform



## Office 365



# Top Tasks & Needs Differ by Functions

## Engineering, Research & Development



**Share best practices across geographies**

## Operations, Manufacturing & Logistics



**Improve and monitor business processes**

## Sales, Marketing, PR & Communications



**Align Sales and Marketing teams**

## HR & Legal Services



**Gather & process forms from employees**

## Accounting, Finance & Procurement



**Pull data and build financial reports**

## Administration



**Organize teams and manage calendars**



# Prioritize Business Needs



Potential demand curves

Line of business integration

Support needs

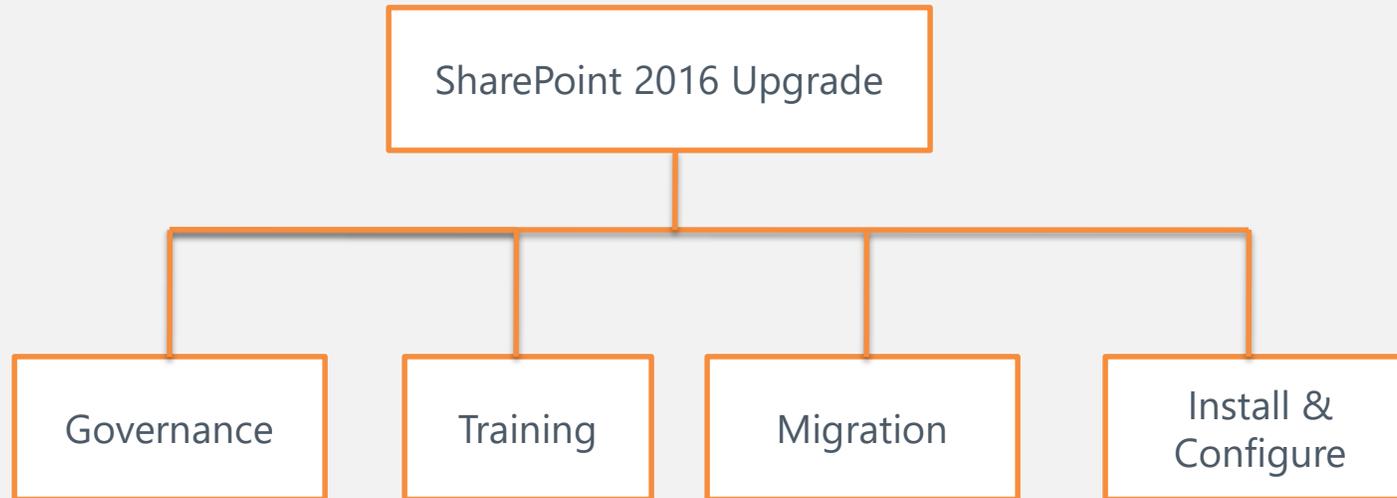
Changing business landscape



# Develop Project Plan

3

# Define the Work Needed



# Realistic Project Schedule

- Create designated times where they will receive formal updates on progress. NOT JUST DURING UAT!
- Schedule specific time to during M7 to train the Champions beyond the general content that becomes available.
- Create a dashboard the stake holders can see so they can monitor and report back on the progress of the project.

Start
▸ <b>M1: Project Plan and Schedule</b>
▸ <b>M2: As-Is Assessment</b>
▸ <b>M3: Infrastructure Requirements</b>
▸ <b>M4: Technical Design</b>
▸ <b>M5: Implementation Plan</b>
◀ <b>M6: Migration Go-Live</b>
◀ <b>Build</b>
On-prem Farm
o365 Tenant
OOB Configurations
Customizations
Infrastructure Build Completed
◀ <b>Migrate</b>
Data Discovery Update
Analysis of Changes
Migration Pilot
Production Migration
End to End Testing
UAT
M6: Migration Go-Live Completed
▸ <b>M7: Training and Documentation</b>
▸ <b>M8: Project Completion</b>
Project Management
Finish



# IT Can You Handle This?



# Migration Execution

4



# Engagement



- Use methods of omni-directional marketing that will land core messages in places your employees already are.
  - *direct email, intranet articles*
  - *staff meetings*
  - *executive briefings and ...*
- Discuss the change from the perspective of the employee not IT or Management
- Answer Ensure the messaging has some semblance of “WIIFM” to build excitement around the change



# Bring in the Business!



Establish a network of **Representative Stakeholders (aka Champions!)** to act as conduits for the business.

- They should understand how their business unit works and be open to learning new technology.
- Include them in the Migration Planning Meetings
- Allow them to act as the voice of the business if concerns arise.



# Champions Engagement



## Who are they?

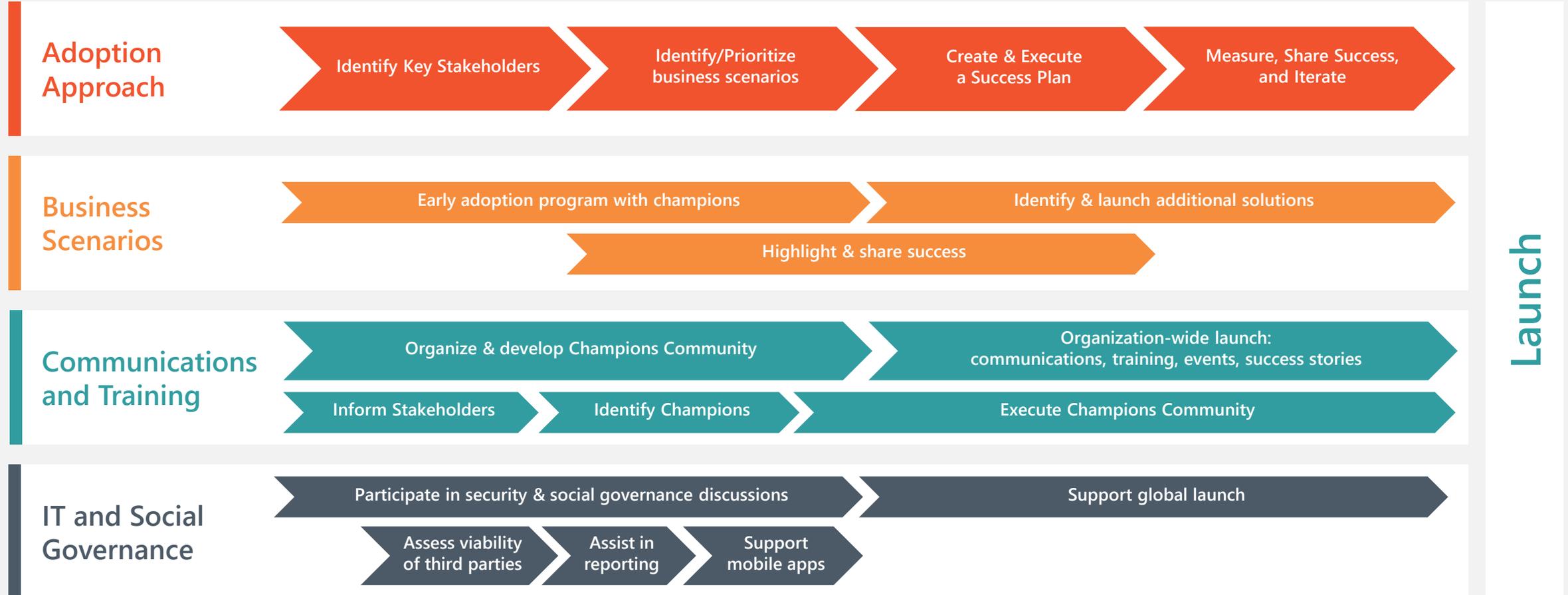
- Champions drive change & ensure you have meaningful feedback from your employees.
- They are an extension of your team, provide peer-to-peer learning and feedback, and build enthusiasm around your project.

## How to engage?

- Find enthusiastic Champions who commit time and effort.
- Ensure a regular rhythm for discussions on what's working and what's not.
- Reward your Champions



# How do Champions Fit into the Launch Planning?





## Make a Difference – Become a Champion

- Get more from Office 365
- Help others do the same
- Enhance your career

Get started at <https://aka.ms/O365Champions>

# Establish Scalable Support





T1-T3 support

Remediation plan

Prioritization

# Facilitate Sustainable Adoption

5





Change is  
often met with  
resistance

Only **34%** are the **early majority** willing to adopt **new technology** within the enterprise \*

# Teams Today are Overwhelmed

---

61%

of time is spent  
coordinating  
collaboration

Source: McKinsey 2012



# Employees Struggle to Find What They Need

---

38%

Of time is lost  
duplicating work and  
searching for  
information

Sources: IDC



# Why Training Alone is Not Working



Non-Contextual

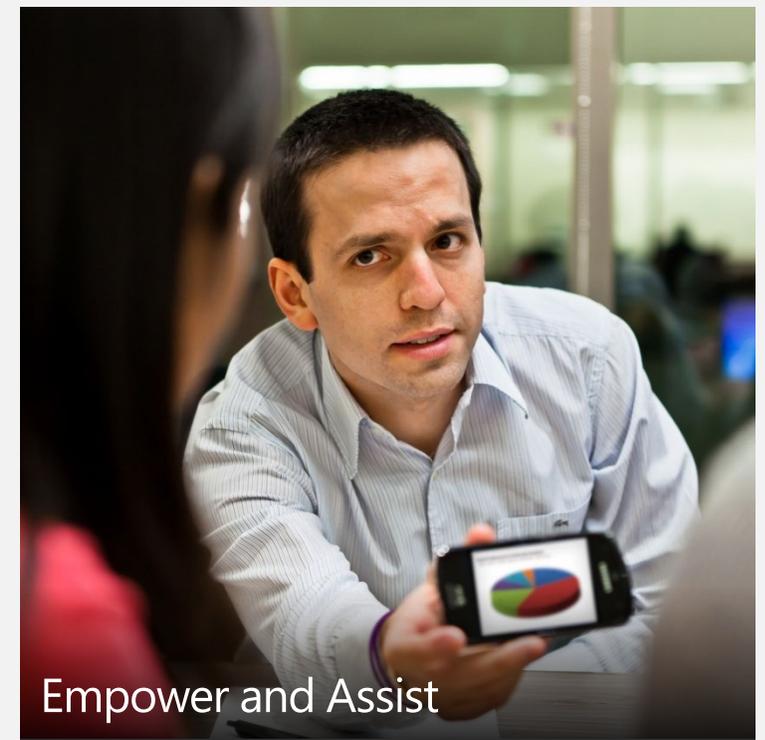
Unclear Roles

Generational Gap

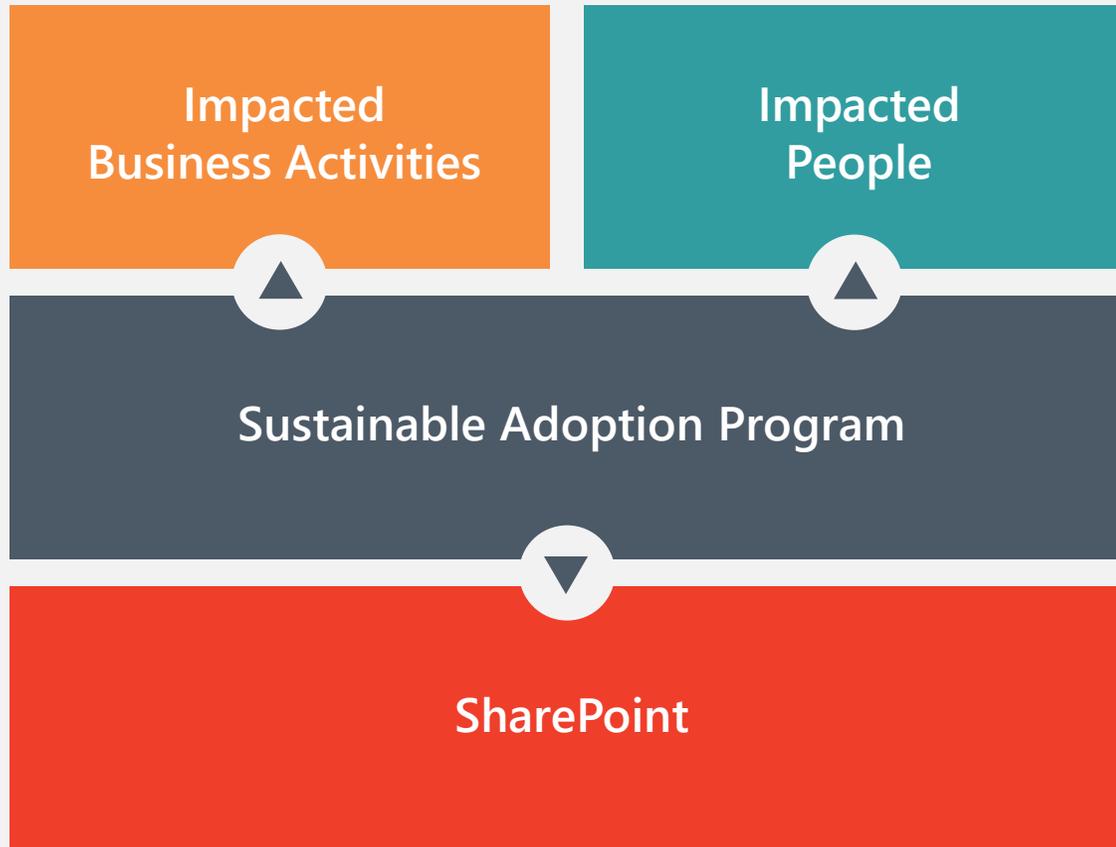
What's In It For Me?



# Goal: Drive Sustainable Adoption



# Sustainable Adoption Objectives



- Minimize the negative impact of making technology changes
- Promote the adoption of new systems and solutions
- Provide users with the resources they need to be successful
- Encourage an organization culture which embraces on-going evolution.



Make it Easy to  
Do the Right  
Thing



# 5 Steps to Drive Sustainable Adoption



Map to  
Business Value

Plan for  
Purposeful  
Collaboration

Drive Success

Evaluate,  
Adapt &  
Iterate



# Secure Stakeholder Buy-In

1

## Define your SharePoint vision



Does the C-Suite understand the value SharePoint brings to the organization?

It's our responsibility to raise executive engagement



# Map to Business Value

2

## Identify and Prioritize Business Needs



Consider Typical Business Challenges

Go After Low Hanging Fruit

Common Pain Points

Identify Quick Wins



# Plan for Purposeful Collaboration

3

## Develop Use Cases



- Prioritize 3-5 Use Cases to start, depending on your resources and goals
- A combination of top down, strategic use cases as well as the viral, bottom up use will further encourage participation and engagement across all levels of the business.



## Intentionally Launch and Promote



Holistic learning and training strategy

Awareness campaigns

Consistently showcase wins



# Evaluate, Adapt & Iterate

## Continuously Drive Engagement

**Office 365 User Satisfaction Surveys**

This document contains sample end-user surveys you can customize for your Office 365 pilot and Enterprise Solution. Gathering feedback from your Office 365 users of user satisfaction and productivity. In addition, the pilot ready to move from the enterprise pilot to a phase of your plan.

The document includes:

- Three (3) pilot user surveys (baseline, mid-point, and final)
- Three (3) rollout survey questions, mid-point, and post-pilot survey with Office 365.

These sample surveys give you a good foundation to be designed for a different pilot in the future:

- Baseline** - Create this survey shortly before pilot or rollout to get data about people's knowledge of Microsoft Office 365, their user knowledge and experience with Office 365, how often they use Office 365, how they use their productivity with the rollout process. You can use this information to help measure user adoption from a baseline survey can help capture user feedback for training or

**Note:** It's best to define your own acceptable levels for scores that setting a "good" target can be an iteration of the survey in detail, specify the answers they expect you want, and then review the results in detail. Take a break and release once you have a chance to insert when it comes from, it's hard to interpret the results afterwards.

For optimal results, customize the questions to meet your or other survey tool for streamlined reporting and analysis.

**Rollout - Final Survey**

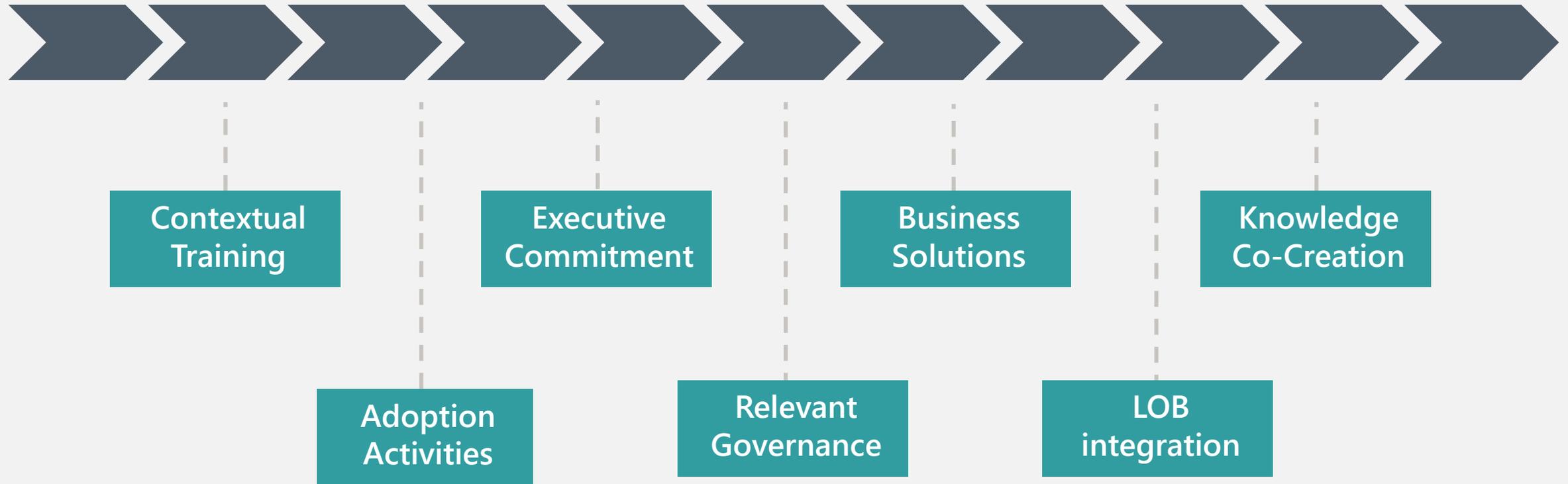
**A. Profile Questions**

1. Please enter the name of the organization you work for.
2. Indicate how well each organization you work for is able to provide effective services.

Organization	Very Poor	Poor	Fair	Good	Very Good	Excellent
Microsoft	1	2	3	4	5	6
Office 365	1	2	3	4	5	6
SharePoint	1	2	3	4	5	6
Lync	1	2	3	4	5	6
Exchange	1	2	3	4	5	6
OneDrive	1	2	3	4	5	6
Skype	1	2	3	4	5	6
Outlook	1	2	3	4	5	6
Word	1	2	3	4	5	6
PowerPoint	1	2	3	4	5	6
Access	1	2	3	4	5	6
Excel	1	2	3	4	5	6
Project	1	2	3	4	5	6
Visio	1	2	3	4	5	6
InfoPath	1	2	3	4	5	6
Forms	1	2	3	4	5	6
SharePoint	1	2	3	4	5	6
Outlook	1	2	3	4	5	6
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OneDrive	1	2	3	4	5	6
Skype	1	2	3			

# Lather, Rinse, Repeat

## Office 365 Journey



# 5 Steps to Accelerate Success



Define Success  
Criteria

Execute  
Migration

Develop  
Project Plan

Facilitate  
Sustainable  
Adoption



# DIGITAL TRANSFORMATION

FROM THE TRENCHES

▶ *Register for FREE at*  
*[ShiftHappensCon.com](http://ShiftHappensCon.com)*

Use Code: "CUSTOMER50"

Washington, D.C.

June 12-13, 2019

#shifthappens

# Get Resources



[avepoint.com/presentations](https://avepoint.com/presentations)

# Let's Connect



Dux Raymond Sy  
[Linkedin.com/in/meetdux](https://www.linkedin.com/in/meetdux)  
[dux.sy@avepoint.com](mailto:dux.sy@avepoint.com)  
  @meetdux

# thank you

Gracias

ευχαριστώ

Danke

Grazie

благодаря

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكراً

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう  
ございます

ໜ້ອຍໜ້ອຍ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

дякую

Ďakujem

Ευχαριστώ



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