



# SHAREPOINT UPGRADE & MIGRATION PLANNING: FROM STRATEGY TO EXECUTION

## Webinar Presentation

In partnership with AvePoint we will share proven best practices that help organizations achieve greater success when migrating to SharePoint Online, Microsoft Teams & more.

50+ Page Whitepaper Available At [SharePointMigrations.com](https://www.sharepointmigrations.com)

Led by David



RICHARD  
HARBRIDGE

CTO & MVP | SPEAKER & AUTHOR | SUPER FRIENDLY

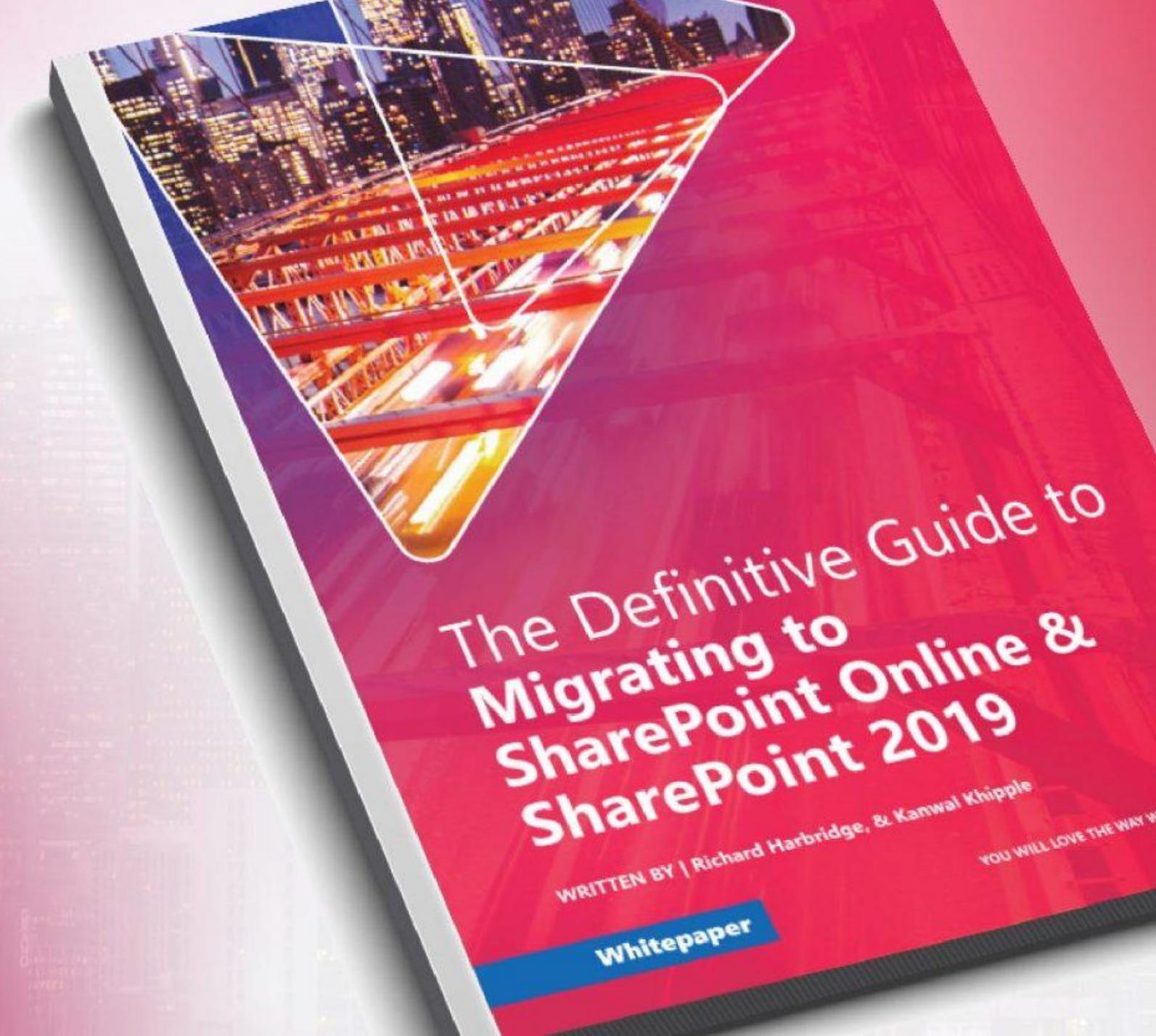
My twitter is [@RHarbridge](https://twitter.com/RHarbridge), I'm super friendly & I am proud to work at [2toLead](https://2tolead.com).



# 50+ Pages with Everything You Need to Know About SharePoint Migrations

↓ **DOWNLOAD**

[SharePointMigrations.com](http://SharePointMigrations.com)



Migration

# What are we hearing?



# End Users

SharePoint sucks. Can't we use something better and modern?

It's too slow and a pain to access.

Why does this have to be one more place to go and work?

It's not easy to move between or find things across different portals.



It's difficult, costly and time consuming to plan for risks.

We have customizations, workflows, forms and more.

I don't have a way to efficiently modernize or optimize all of it.

How will we stop this from being a mess again and unmanaged?



IT Leaders

Migration

Where's the **best practices?**



## *SharePoint Upgrade & Migration Planning*

# **| The Destination Is Microsoft 365**

Navigation Before, After & During

Leverage Microsoft, Partners & Community

Prioritize & Phase The Migration

Migration Isn't The Same As Optimization

Manage Sprawl As Soon As Possible

SharePoint sucks. Can't we use something better and modern?

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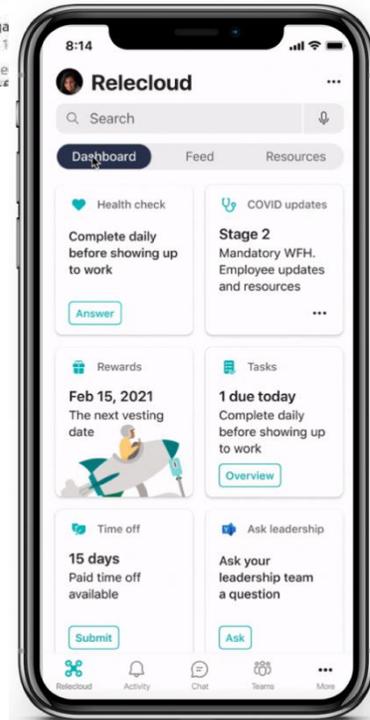
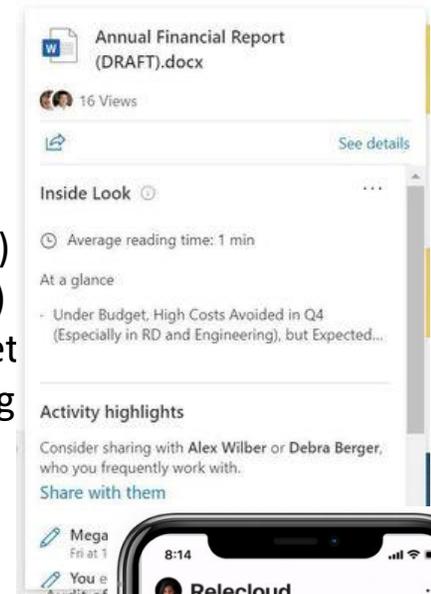
# SharePoint Server Or **SharePoint Online?**

The functionality in SharePoint Server has not even come close to feature parity with many online features from 4+ years ago. SharePoint Server is not as good as SPO.

## New Updates Since Code Freeze & SP2019 Locked:

1. Megamenu Navigation & New Change The Look Options (Megamenues, Site Headers, Site Footers, Site Designs, etc.)
2. SharePoint Page Improvements (Customize Title Region, Section Backgrounds, Page Templates, Page Approval, etc.)
3. Web Part Updates (Organize News, Events Rollup, Authoritative News, Audience Targeting, Connected Web Parts, et
4. List/Library Improvements (Bulk Check In/Check Out, Column Totals, Sticky Headers, Create From, View Format, Org Templates and much more.)
5. Ease Of Use (Drag & Drop Navigation, D&D Columns, Org Assets, etc.)
6. Engagement Improvements (@Mentions, Comment Notifications, Improved Analytics, Yammer, etc.)
7. New Web Parts (Youtube, Countdown, My Recent Docs, My Frequent Sites, Code Snippet, Markdown, etc.)
8. Admin & Security Improvements (Improved Administration, Sensitivity Labels, Multi-Geo Capabilities, etc.)
9. External Access & Sharing Improvements (Guest Links, Guest Users, Requested Files, etc.)
10. Better Performance & AI Powered Insights (Content & Activity Insights, Massive Performance Improvements, etc.)
11. More Intranet Improvements (External News/News Links, Home Sites, Hub Sites, etc.)
12. Everything in Microsoft Viva, Microsoft Lists, Microsoft Forms, Microsoft Teams, etc.

While a few of these were addressed (partially) in SharePoint Server Subscription Edition a great many were not. And this list? It was the differences from back in 2019 (2+ more years of innovation not represented)!



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It's too slow and a pain to access.

A: From Server To Service Provides Better Performance.

Why does this have to be one more place to go and work?

It's not easy to move between or find things across different portals.



*This is from 2+ years ago.  
There were many updates since.*

# Turbocharged SharePoint file storage

Fast, phenomenal and fluid

**10X**

faster downloads

**3X**

performance

**30x**

faster indexing

**320+**

file types

← AI-POWERED INSIGHTS — INTELLIGENT SECURITY — INNOVATIVE EXPERIENCES →

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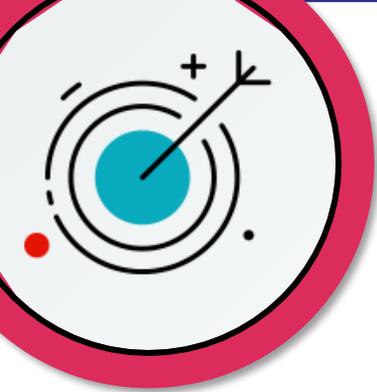
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A: Navigation Is Paramount Until Transitioned.





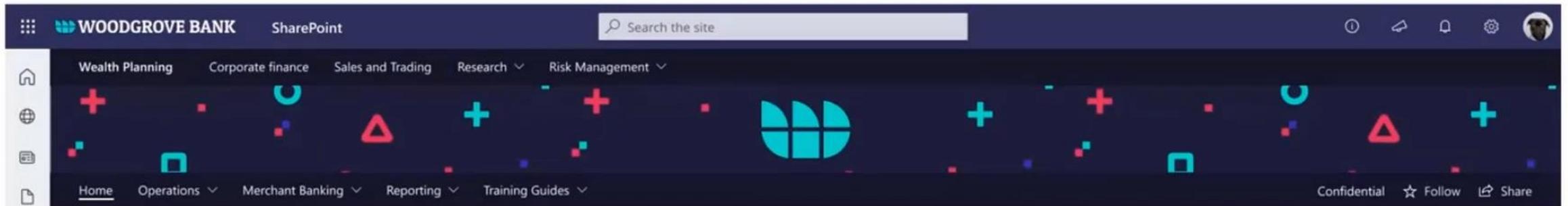
# Navigation

Plan an effective navigation for improved experiences to support the transition.



## ✓ Digital Workplace Navigation Matters

There is a lot more to designing an effective and improved navigation experience than just turning on and setting up a hub mega menu or global links.





# Navigating Your Digital Workplace



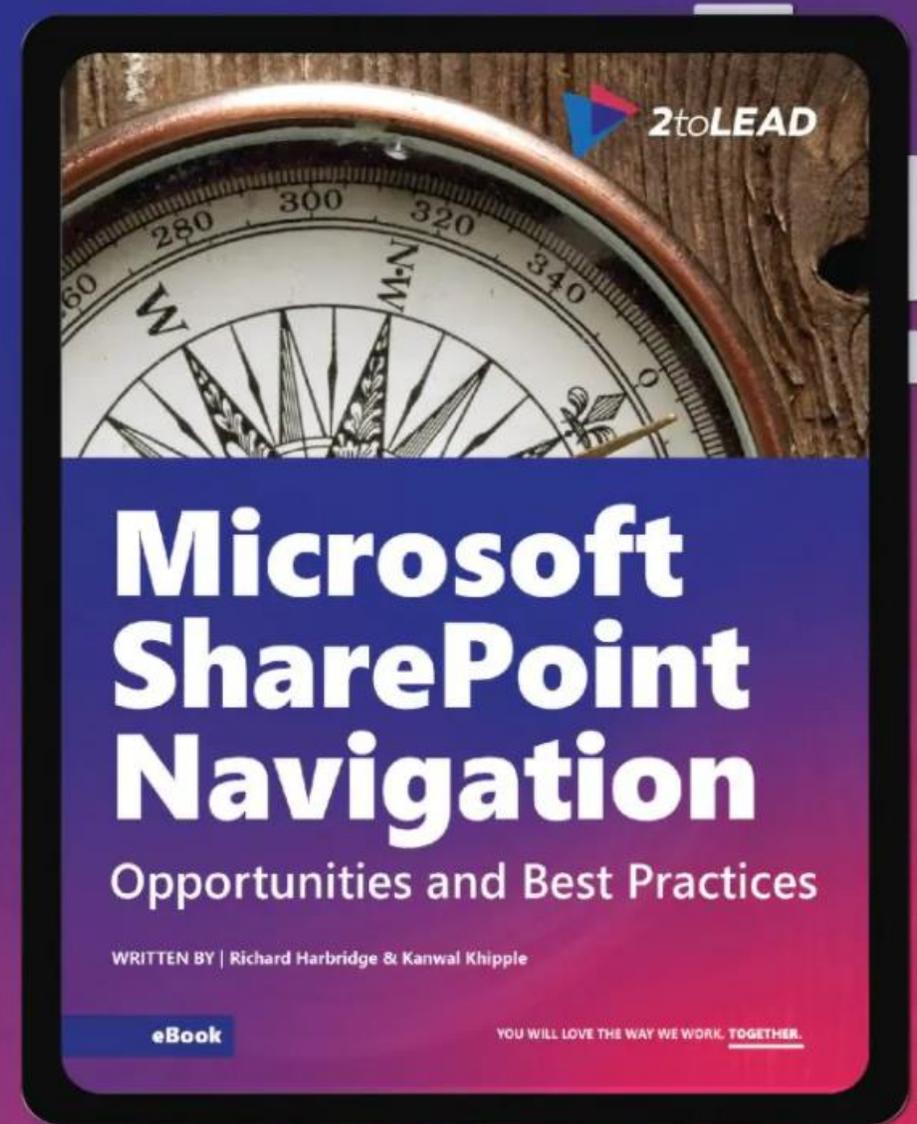
Design and implement an improved experience that gives you quick access to teams, sites, communities, and more across environments. Complimenting your Digital Workplace Strategy. [www.M365Sprawl.com](http://www.M365Sprawl.com)

The screenshot shows the Waypoint application interface. At the top, there is a search bar with the text "Search or type a command". Below the search bar, the "Waypoint" logo is visible, along with navigation links for "Navigate", "Directory", and "About". The main content area displays a list of "Workspaces" with columns for Name, Description, Type, and Department. The list includes various projects and teams, such as "Alpha Nine Project", "Accounting", "Birch Tree Project", "Communications", "Change Management CoP", "Engineering", "Finance", "Manufacturing", "Marketing", "Operations", "Quality Assurance", and "Research".

Name ↓	Description	Type ↓	Department ↓
AN Alpha Nine Project	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Communication Site	Technical Services
A Accounting	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Team Site	Finance & Accounting
BT Birch Tree Project	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Communication Site	Technical Services
C Communications	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Team Site	Brand
CM <b>Spotlight Change Management CoP</b>	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Project Management Office
E Engineering	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Technical Services
F Finance	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Finance
M Manufacturing	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Technical Services
M <b>Spotlight Marketing</b>	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Classic Site	Brand
O Operations	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Team Site	Operations
QA Quality Assurance	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Communication Site	Technical Services
R Research	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Classic Site	Innovation

**Make every  
move count  
when navigating  
your intranet and  
digital workplace.**

 **DOWNLOAD**



<https://www.2tolead.com/microsoft-navigation-ebook/>

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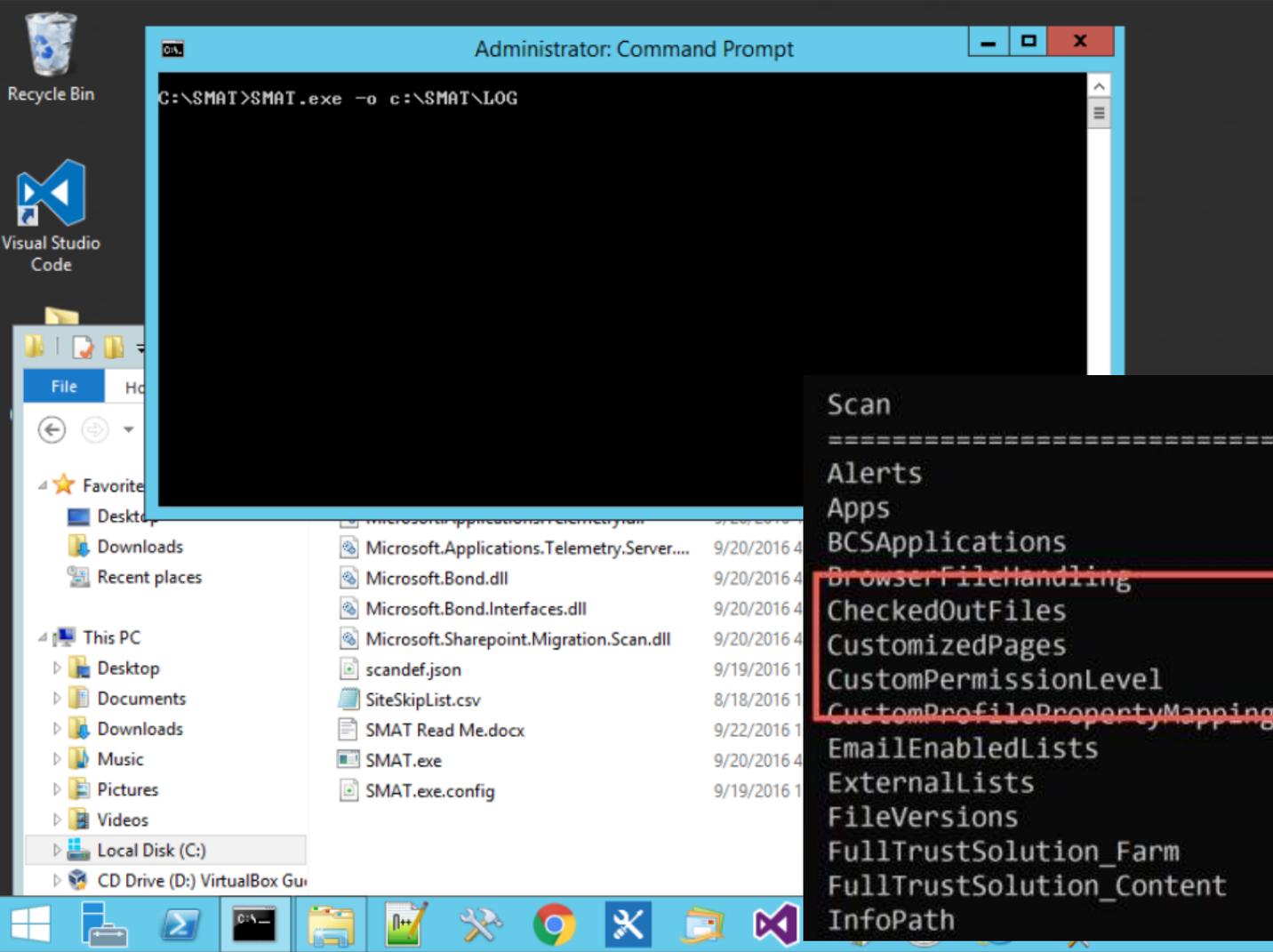


**IT Leaders**

# Microsoft Has **Invested**



Today Microsoft has migration tooling for common file share and SharePoint migration scenarios but is also beginning to tackle cross-tenant or Microsoft 365 to Microsoft 365 migration scenarios as well.



Scan	Status	% Complete	# Items	Status Message
Alerts	Finished	100	0	Finished scan work
Apps	Finished	100	0	Finished scan work
BCSApplications	Finished	100	0	Finished scan work
BrowserFileHandling	Finished	100	0	Finished scan work
CheckedOutFiles	Finished	100	1	Finished scan work
CustomizedPages	Finished	100	2	Finished scan work
CustomPermissionLevel	Finished	100	1	Finished scan work
CustomProfilePropertyMappings	Finished	100	0	Finished scan work
EmailEnabledLists	Finished	100	0	Finished scan work
ExternalLists	Finished	100	0	Finished scan work
FileVersions	Finished	100	3	Finished scan work
FullTrustSolution_Farm	Finished	100	0	Finished scan work
FullTrustSolution_Content	Finished	100	2	Finished scan work
InfoPath	Finished	100	0	Finished scan work

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- Home
- Sites
  - Active sites
  - Deleted sites
- Policies
- Settings
- Content services
- Migration**
- Reports
- Advanced
- More features
- Customize navigation
- Show all

## Migration

### Migration Manager

[Learn what's new](#)



#### File shares

Copy your on-premises file shares to Microsoft 365. [Learn more](#)

Get started



#### Box

Copy your Box content to Microsoft 365. [Learn more](#)

Get started



#### Google Workspace

Copy your Google Workspace content to Microsoft 365. [Learn more](#)

Get started



#### Dropbox

Copy your Dropbox content to Microsoft 365. [Learn more](#)

Get started

### Other migration solutions



#### For SharePoint Server 2010, 2013 and 2016

Use the SharePoint Migration Tool to copy content from SharePoint Server to Microsoft 365.

Download SharePoint Migration Tool



#### For cloud environments

Use Mover to copy content from other cloud services to Microsoft 365.

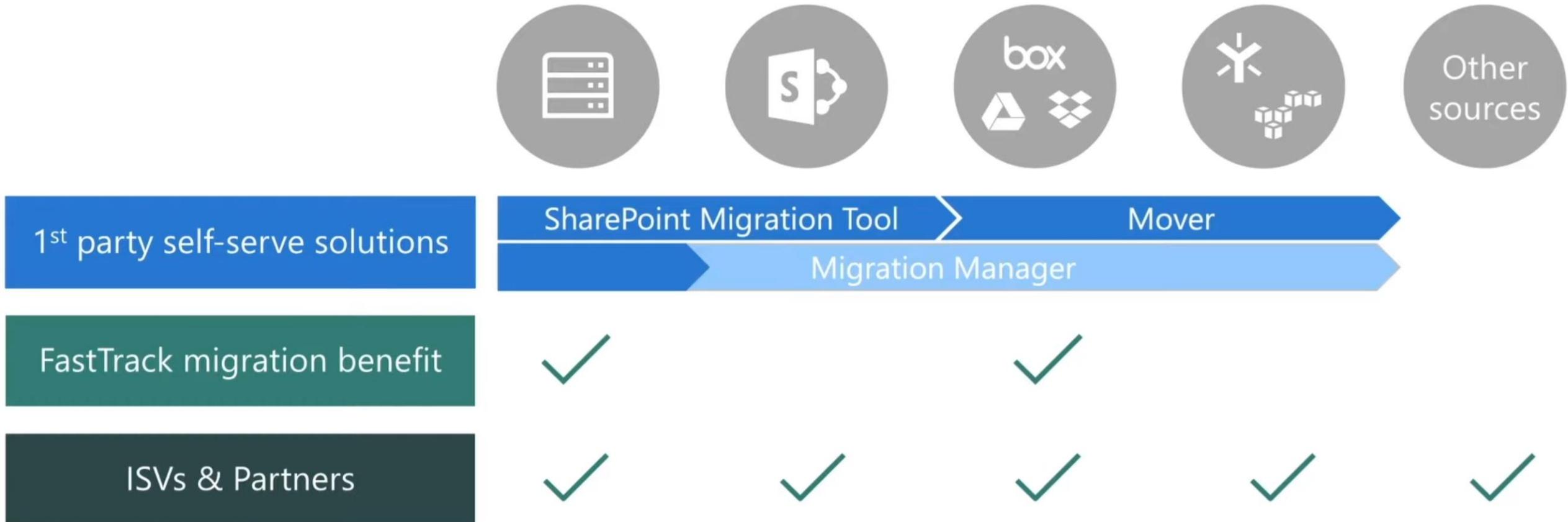
Go to Mover



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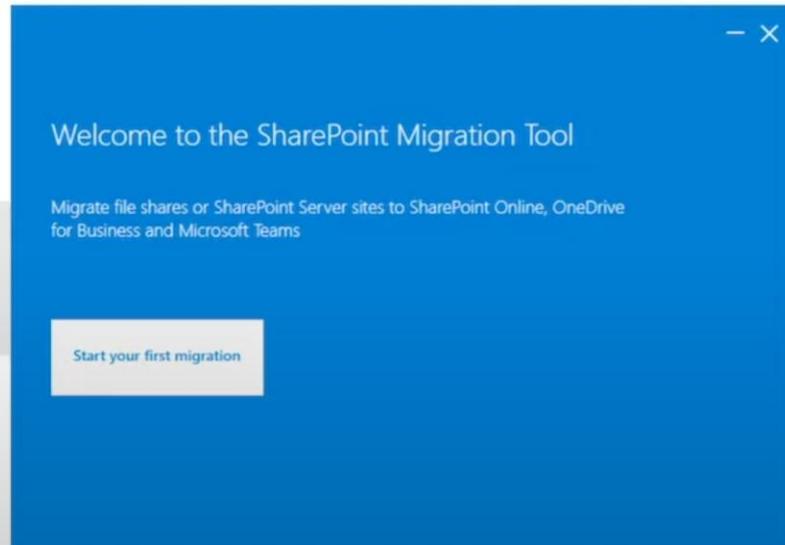


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**SharePoint Server**  
2010, 2013, and 2016\*



**File shares**



**33 PB+**  
Migrated content

**84K+**  
Unique tenants

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## SPMT updates

[aka.ms/SPMT](https://aka.ms/SPMT)



### SITE MIGRATION

Modern SharePoint team sites

Libraries, lists, pages, web parts and more



### MIGRATION TO TEAMS

Simple UI guiding users

Teams picker

Channel targeting



### BUILT IN USER FEEDBACK

One click to report issues and provide feedback

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## How cross-tenant mailbox migration works



Secure

Admins in both source and destination tenants enable moves; either side can disable



Robust

Mailbox Replication Service (MRS) also used for onboarding, Multi-Geo, service load-balancing moves



Efficient

Direct migration stays within the service and does not traverse a middle tier

# Migration Experience



There are three primary candidates for migrating content.

**1**

## Manual

- Content is moved manually via uploading
- Free
- Manual effort may not be feasible for a large volume of files

**2**

## Microsoft Tools

- Content is moved via the SharePoint Migration Tool (SPMT)
- Free
- Limited feature set
- Only supports certain scenarios\* (File Shares, SP2010, SP2013, SP2016)

**3**

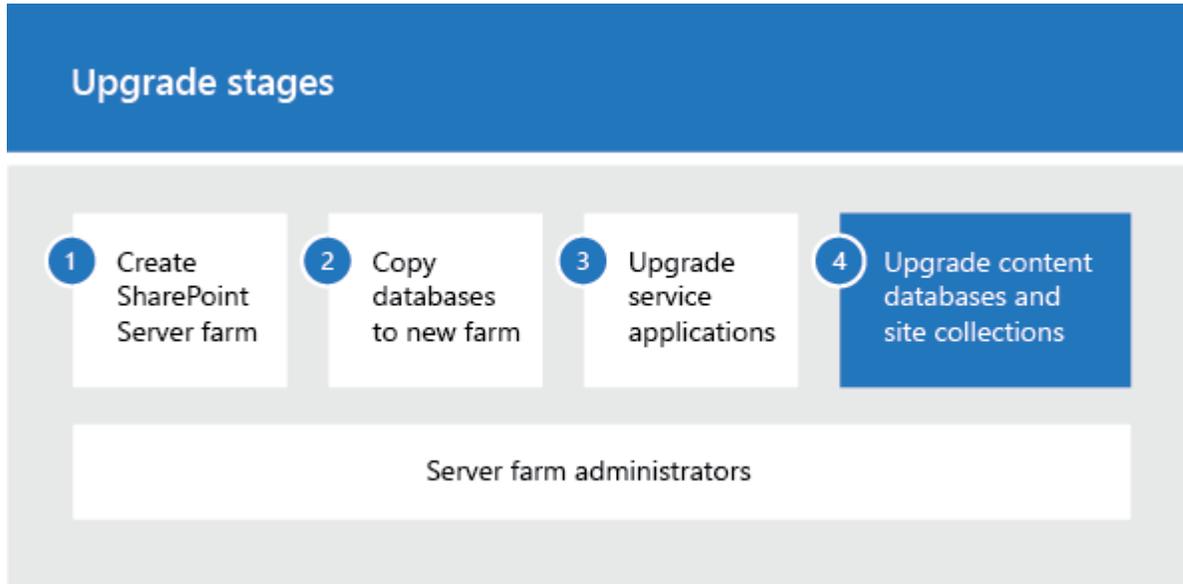
## Third Party Tools

- Content is moved via a tool (e.g. AvePoint)
- Powerful feature set (e.g. Version history)
- More costly, but the cost can easily be justified in large, more complex migrations

# SharePoint Server Subscription Edition **Upgrades**



If possible, we should always go from SharePoint Server to SharePoint Online, but some may choose a path that involves SharePoint Subscription Edition to support specialized investments.



### Why modernize SP Server?

1. MFA Support & Conditional Access (OIDC)
2. Windows Server 2022, TLS 1.3 & Strong TLS
3. Modern Improvements (Search & Usability)
4. Minor Admin Improvements (SP PowerShell)
5. Improved People Picker (No Claims Provider)
6. Updating “No More 20XX Versions?”

*There are still hundreds of improved experiences, features and capabilities NOT in SP Server. Go to Online if you can.*

### Prepare

- Create & Configure SSSE Farm
- Create Web Apps (For Each 2019 or 2016 Target)



### Copy

- Set to read-only and back up content and service DBs.
- Copy SP Server 2019/2016 Service & Content DBs (BDC, Managed Metadata, Search, Secure Store, User Profile)



### Upgrade

- SP2019/2016 Service Apps
- Install Customizations
- SharePoint 2019 or 2016 Content DB Attach Upgrades
- Upgrade Site Collections (& MySites – If Not During Attach)

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Navigation Before, After & During

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A: Everyone Does. Priority Matters Here Most.

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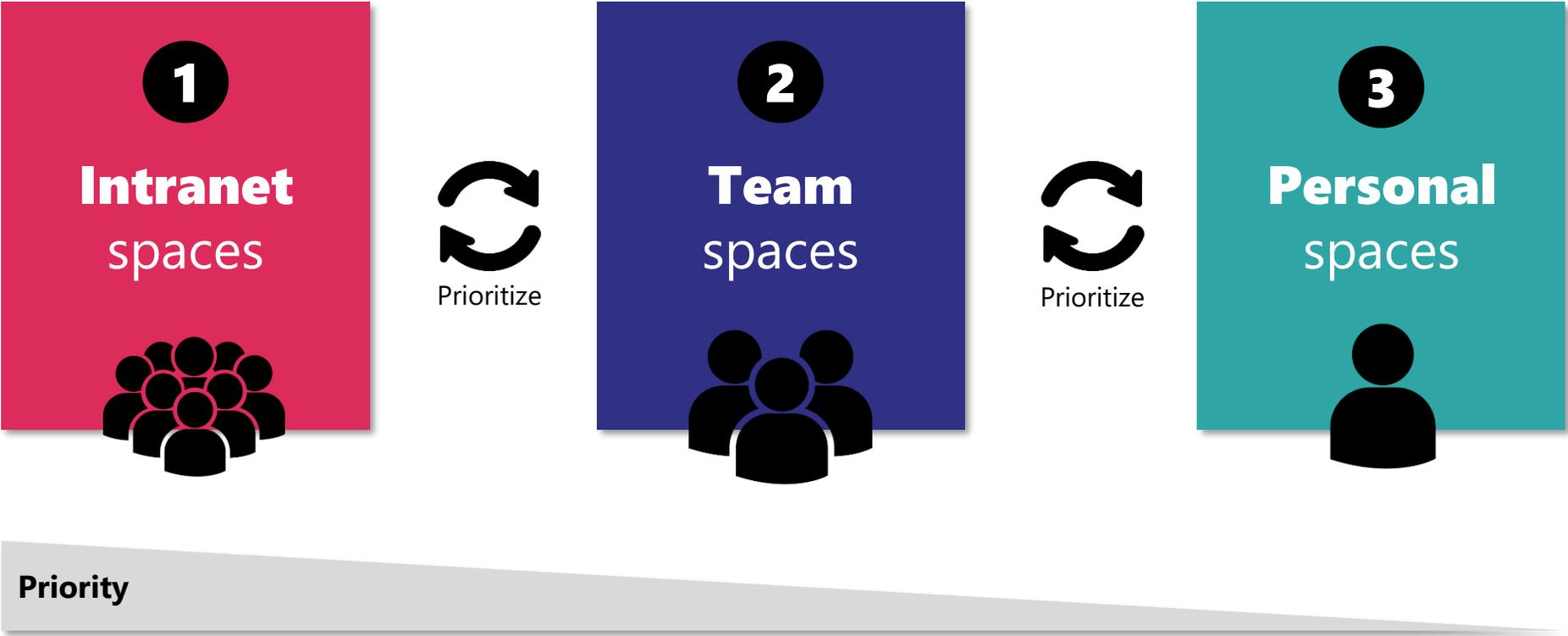


IT Leaders

# Prioritization



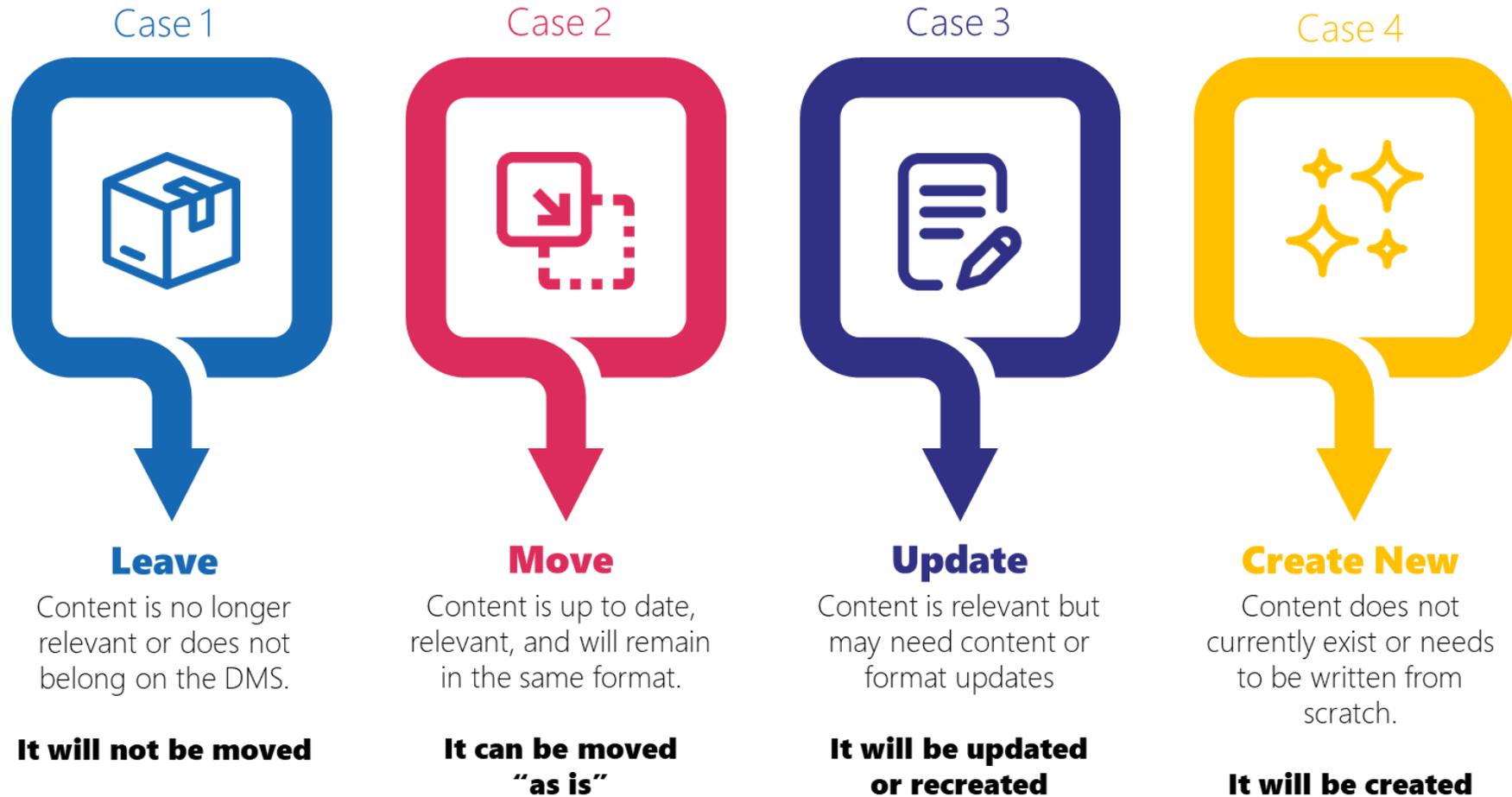
Priority can be decided based on the size of a space's audience



# Migration Approach



What are the typical decisions around content/sources? Content and solutions use the same choices.





# Solution Migrations

Prioritization is based on difficulty and value.



## Estimated Value

## Estimated Difficulty

I have a difficult solution. It's an **8** in difficulty (out of 10).

I have an easy solution. It's a **2** in difficulty (out of 10).

The expected value of the difficult solution is 4 (out of 10).

The expected value of the easy solution is 6 (out of 10).

Estimated Value  
Estimated Difficulty

Title	Estimated Value	Estimated Difficulty	ROI
Difficult	4	8	50%
Easy	6	2	300%



# Solution Migrations

Prioritization is based on difficulty and value. Incorporate ranges for even better estimate calibration and more ways to evaluate priorities.



Never Give a Single Number



## Solution Migrations

Prioritization is based on difficulty and value. Incorporate ranges for even better estimate calibration and more ways to evaluate priorities.



Ranged Estimates Help Communicate  
Confidence and Set Expectations



# Solution Migrations

Between SMAT data, scanners (for Online migrations) and partner tooling (from companies like AvePoint and 2toLead) you have the information you need.



## ✓ Scan & Plan

SharePoint Modernization Scanner (version 2.9.0.0)

### Configure the sites to scan

Use this wizard to configure the options for your scan

SharePoint Modernization Scanner (version 2.19.0.0)

### Select the scan mode

Use this wizard to configure the options for your scan

Select the scan mode to use: **All of the above (full scan)**

Components included in the selected scan mode:

- Office 365 Group connection readiness
- Modern list experience readiness
- Wiki/Webpart Page transformation readiness (home pages)
- Wiki/Webpart Page transformation readiness (all pages)
- Publishing portal transformation readiness
- Publishing portal transformation readiness (detailed)
- Classic workflow usage
- Classic workflow usage (detailed)
- InfoPath usage
- Classic Blog usage
- SharePoint Designer customized forms

< Back    Next    Cancel

Filters

Workflow details

Site structure

Navigation

Version	Upgrade to Flow	Upgradability %	Scope	Last Modified Year	Last Modified Quarter
2010	False	-1	(blank)	2013	Q1
2013	True	100	ContentType	2014	Q2
		50	List	2016	Q3
		75	Site	2018	Q4
				2019	

Count of Site Url

Recommended for upgrade to Flow

Upgrade to Flow	Count
False	10
True	8

Migration to Flow recommended

Count of Site Url

Flow Upgradability %

Upgradability %	Count
-1	6
100	5
50	6
75	1

Flow upgradability

Workflows scoped to a list or contenttype, which are not disabled, have subscriptions and are not an OOB workflow are good candidates to start upgrading to Microsoft Flow. You can also upgrade site scoped workflows by connecting them to a list.

A workflow uses workflow actions of which most have an equivalent in Microsoft Flow. The upgradability score shows the percentage of actions in the classic workflow that have an equivalent in Microsoft Flow.

Site collection Url	Complexity	# Pages	Level
https://bertonline.sharepoint.com/sites/intranet	Complex	16	0
https://bertonline.sharepoint.com/sites/modernizationtestportal	Medium	13	1
https://bertonline.sharepoint.com/sites/pagestest2	Simple	8	2
https://bertonline.sharepoint.com/sites/prntest2		7	3
https://bertonline.sharepoint.com/sites/portaldemo		6	

Count of Site Url

Work

Version

Count of Site Url

Site level (hierarchy)

Level

Count of Site Collection Url

Portal complexity

SiteCollectionComplexity

Count of Site Url

Used Web Templates

WebTemplate

**Resources:** Dashboard version: 0.2 (beta)  
[Modernizing your classic SharePoint sites](#)  
[Getting started with Microsoft Flow](#)

**Scanner summary:**  
 Date: 10/22/2019 19:27:31  
 Sites: 535    Webs: 670    Lists: 4317  
 Duration: 0 days - 0 hours - 29 minutes and 40 seconds  
 Version: 2.6.0.0

**Definition Name**

- Approval - SharePoint 2010
- Bert's copy of Approval - SharePoint 2010
- ContentTypeTest
- Custom site level - SharePoint 2010
- Demo3
- Demo4
- demo5 (sp2013)
- demo6 (sp2010 on cts)
- demo7 (sp2013 reusable)

**Site Url**

- https://bertonline.sharepoint.com/sites/130063
- https://bertonline.sharepoint.com/sites/130064
- https://bertonline.sharepoint.com/sites/
- https://bertonline.sharepoint.com/sites/intranet

**Web Template**

- CMSPUBLISHING#0
- COMMUNITYP#0
- SRCHCENT#0
- BLANKINTERNET#0
- STS#0

**Resources:** Dashboard version: 1.0  
[Moving from Publishing sites to Communication sites](#)  
[Modernizing your classic SharePoint sites](#)  
[Modernize classic publishing portals](#)

**Scanner summary:**  
 Date: 10/22/2019 19:27:31  
 Sites: 21    Webs: 40    Pages: 136  
 Duration: 0 days - 0 hours - 29 minutes and 40 seconds  
 Version: 2.6.0.0

**Site Structure**

Understanding the structure of your publishing portals does help to understand how to model your future modern publishing portal. Use the filter on left to select the portal that you want to review.

Depending on the level (hierarchy) of your site we recommend you to use this approach:

- Level = 0: create a communication site as replacement and make this a hub site.
- Level = 1: create a communication site and connect it to the hub at level 0.
- Level = 2 or higher: It's recommended to flatten and consolidate to lesser levels. Alternatively you can link one hub to another hub. A deep structure is only important if you want to rollup to multiple levels of news.

To learn more click [here](#)

**Navigation**

Understanding the navigation model used by your publishing portals helps you understand how to configure navigation for your future modern publishing portal

Use the filter on left to select the portal that you want to review.

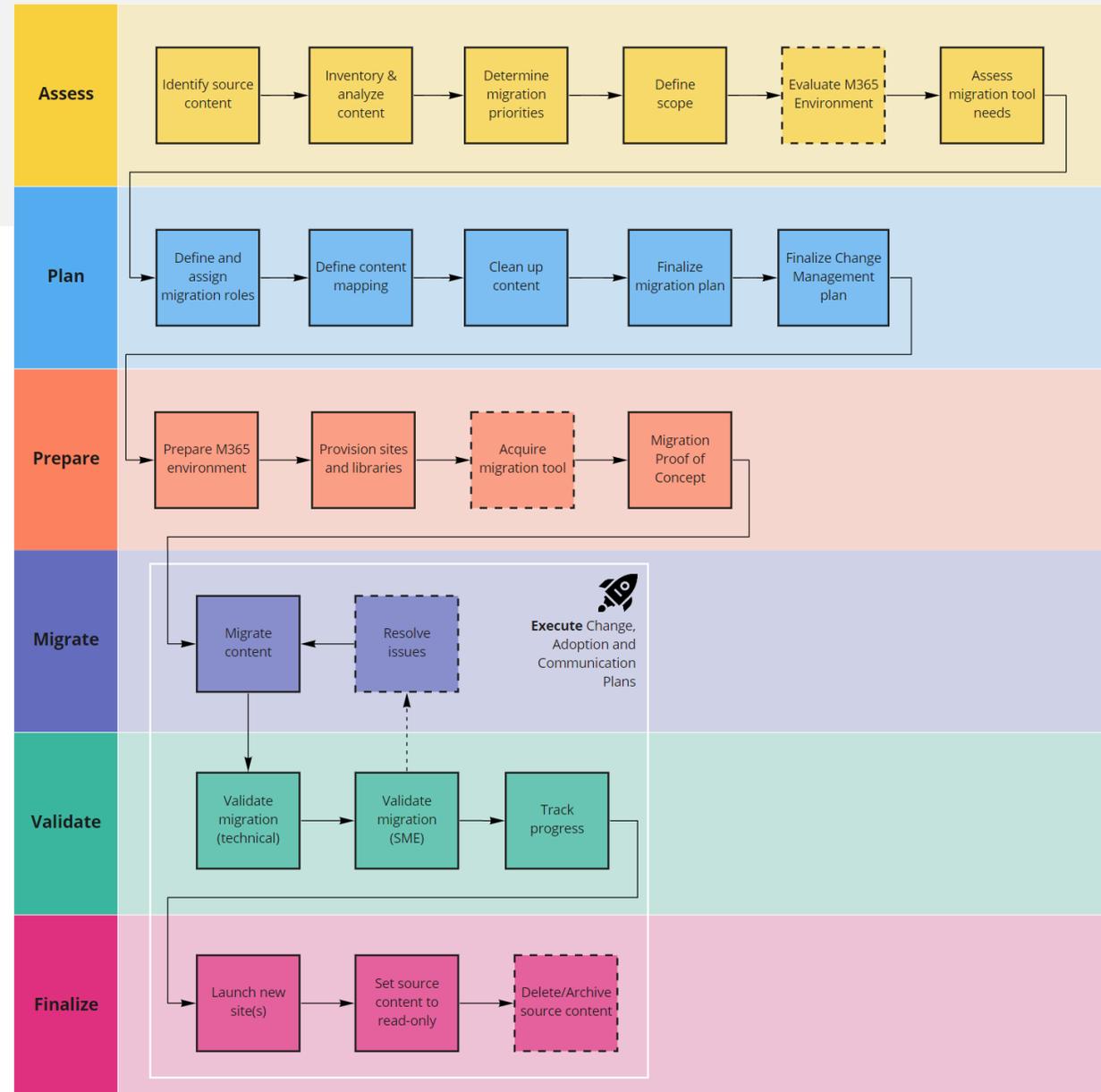
Depending on the shown global/current navigation type we would recommend:

- Structural / managed navigation: both the hub navigation and site navigation support up to three navigation levels. Add the sites joined to the hub into hub navigation and add pages either in the site navigation or in the hub navigation.
- Search driven navigation: this currently is not an OOB supported model. Using SharePoint framework extensions you however can realize this.

To learn more click [here](#)

# Migration Process

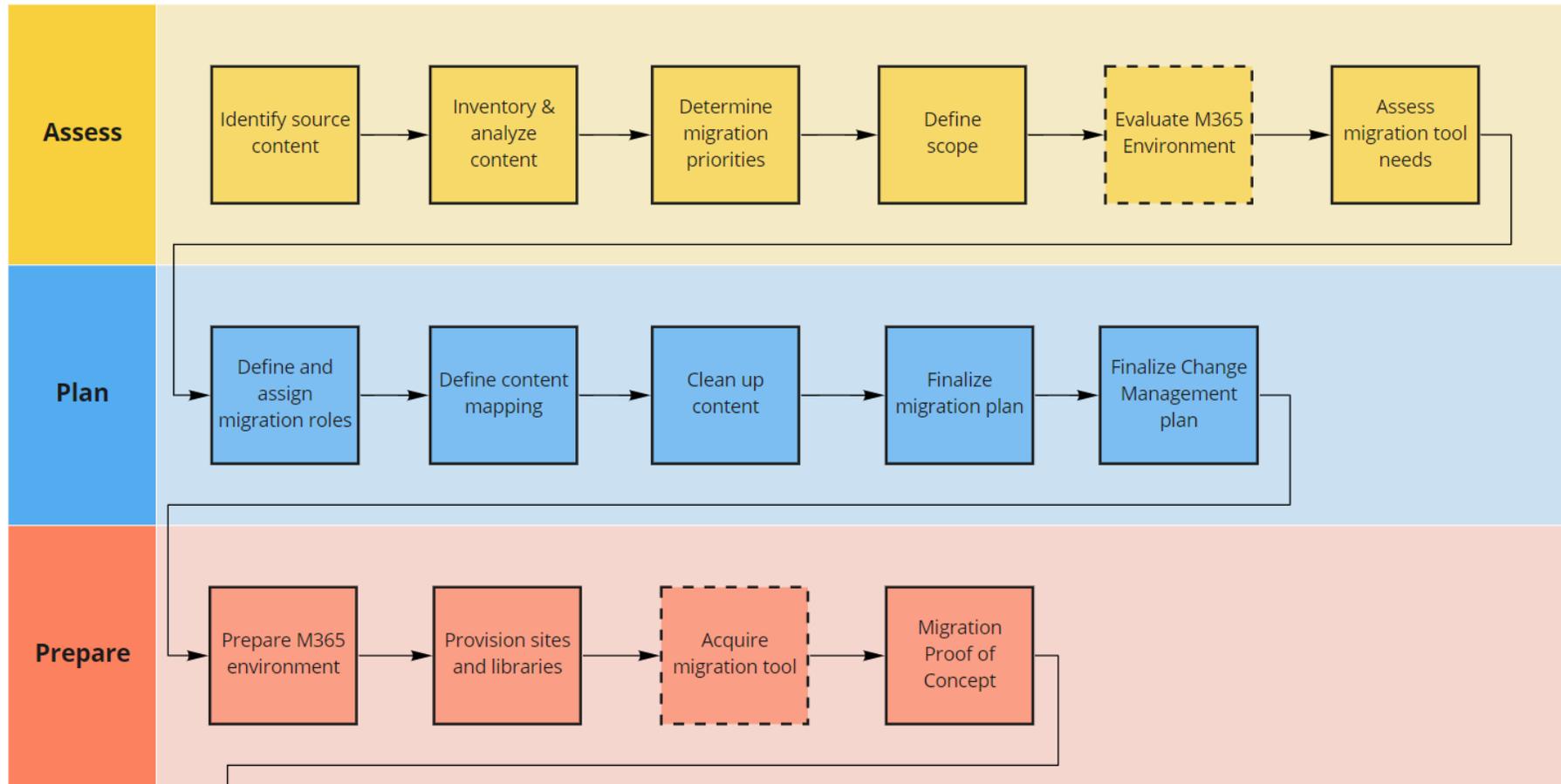
What is the typical migration process?



# Migration Process



What is the typical migration process?

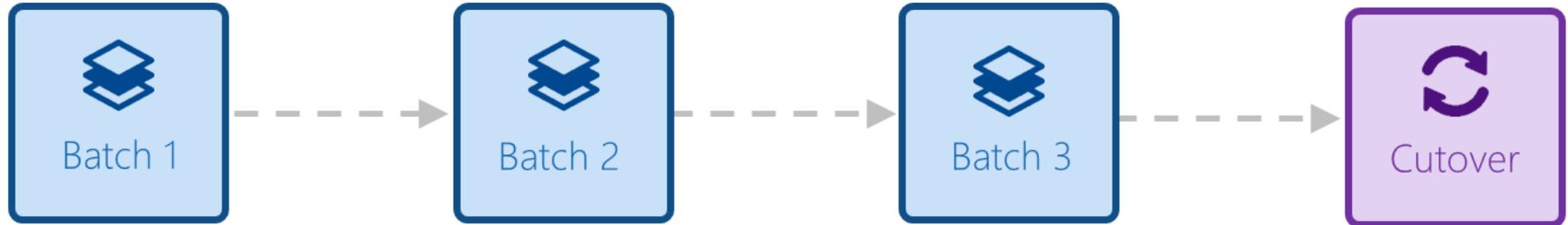


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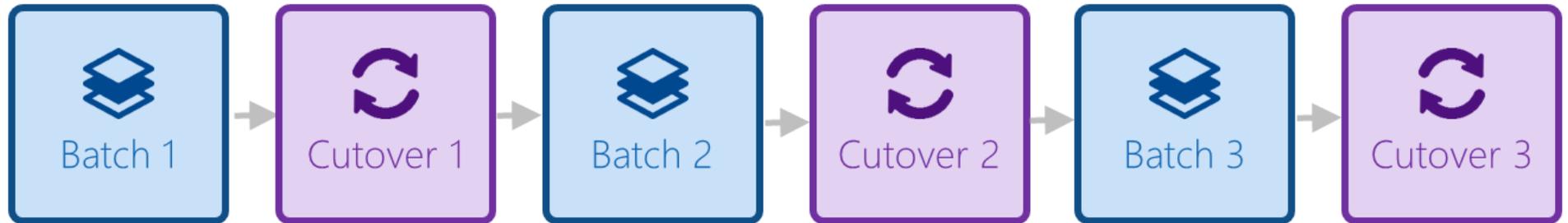


The process will involve migrating batches but can enable cutover for some groups in a more phased approach.

## Option 1



## Option 2



# Migration Process



The process will involve migrating batches but can enable cutover for some groups in a more phased approach.

Batch	Migration Tracking			Validation Tracking			Cutover Tracking		
Number	Target Date	Owner	Status	Target Date	Owner	Status	Target Date	Owner	Status
1	June 11, 2021	Rob Smith	Complete	June 11, 2021	Susan Geo	Complete	June 11, 2021	Rob Smith	Complete
2	June 12, 2021	Rob Smith	Complete	June 12, 2021	Mat Wilson	Complete	June 12, 2021	Rob Smith	Complete
3	June 13, 2021	Rob Smith	In Progress	June 13, 2021	Susan Geo	In Progress	June 13, 2021	Rob Smith	In Progress
4	June 15, 2021	Rob Smith	Not Started	June 15, 2021	Mat Wilson	Not Started	June 15, 2021	Rob Smith	Not Started
5	June 16, 2021	Rob Smith	Not Started	June 16, 2021	Susan Geo	Not Started	June 16, 2021	Rob Smith	Not Started

Migration of individual content areas is tracked



Validation of individual content areas is tracked



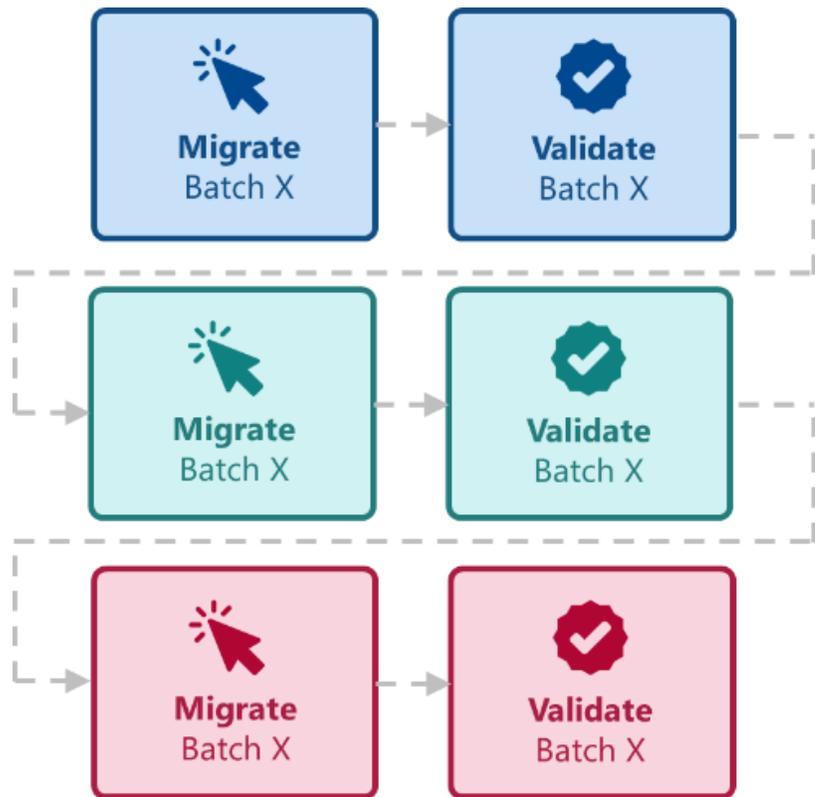
Cutover of individual content areas is tracked



# Migration Process



The process will involve migrating batches but can enable cutover for some groups in a more phased approach.



- Many solutions were built before investments in other technologies were made.
- Solutions shouldn't hold up content migration.
- Content migration often leads to less solution dependency.
- There are many paths for off-setting solutions online. Power Platform is often not needed.
- Deferring solutions gives time for more marketplace and organization skillset development.

# Roles & Responsibilities



Who are the main groups involved in migration and what does each do? There are lots of ways to reduce costs in the migration of content so that more investment can be made on solutions.

## Migration Lead

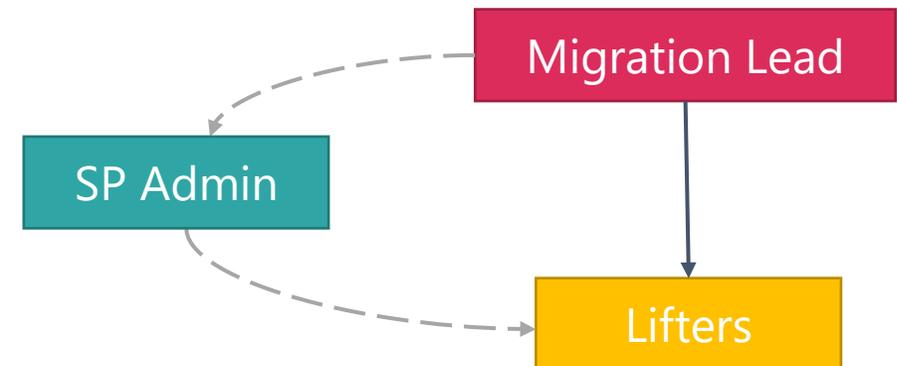
- Keeping sight of the overall migration plan
- Keeping activities on track

## SharePoint Admin

- Content types, columns, term store, navigation
- Granting needed access
- Content migration using a tool

## Lifters

- Movers just for migration (no ties to content)



The migration plan and design work makes executing the migration of content extremely easy since it's just inputting source and target information (with a target pre-built and a mapping pre-planned). This can be done by **lower cost resources** to reduce the migration project's costs.

It's difficult, costly and time consuming to plan for risks.

A: Don't Do This Alone. Leverage MSFT & Partners

We have sites, customizations, workflows, forms and more.

A: Everyone Does. Priority Matters Here Most.

I don't have a way to efficiently modernize or optimize all of it.

How will we stop this from being a mess again and unmanaged?



IT Leaders

## *SharePoint Upgrade & Migration Planning*

The Destination Is Microsoft 365

Navigation Before, After & During

Leverage Microsoft, Partners & Community

### **| Prioritize & Phase The Migration**

Migration Isn't The Same As Optimization

Manage Sprawl As Soon As Possible

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How will we stop this from being a mess again and unmanaged?



IT Leaders

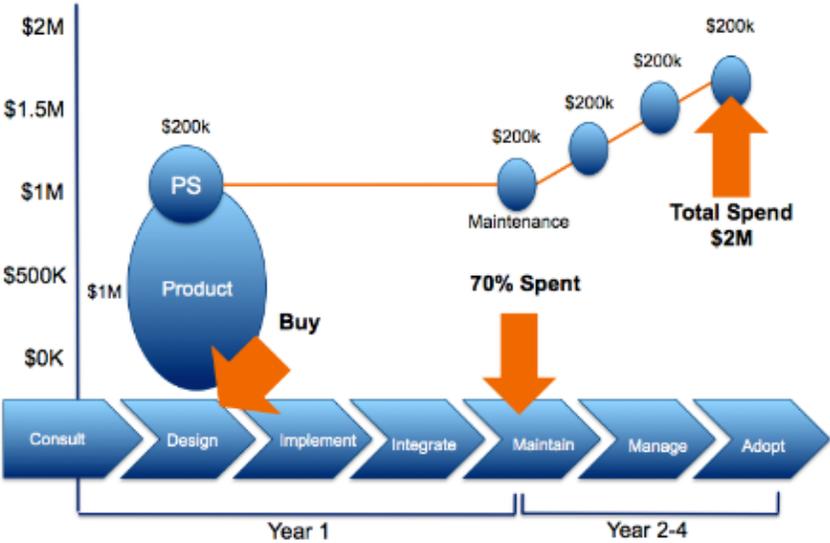
# Migration **Funding**



While it's tempting to front-load optimization into the migration pattern it is rarely the most efficient approach. There are better tools to optimize in the cloud or modern environment.

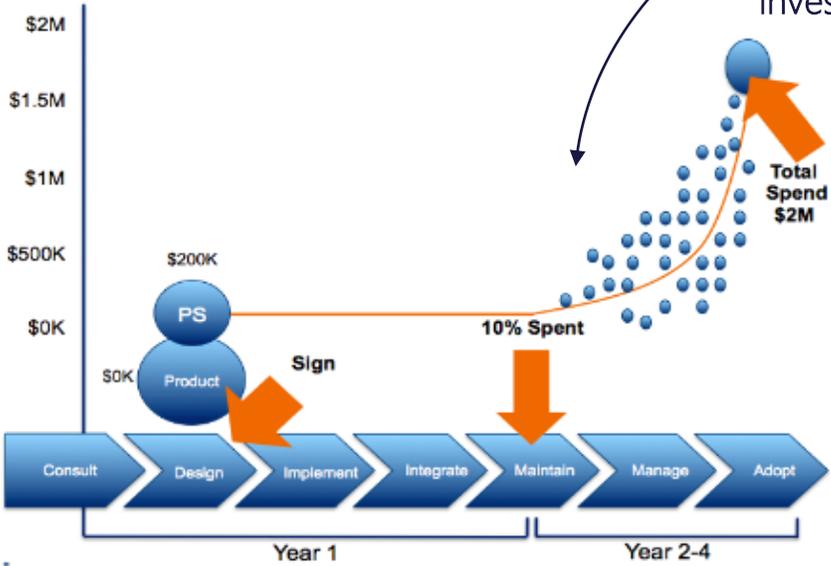
## Before the Cloud, We Thought...

*The Transaction  
Was an Asset Purchase*



## After the Cloud, We Realized...

*The Transaction  
Is an Ongoing Service*



This also means that IT budget for upgrades/migrations needs to come from somewhere. Once you are Online how will you trigger the right investments over time?

# Migration Versus **Optimization**



While it's tempting to front-load optimization into the migration pattern it is rarely the most efficient approach. There are better tools to optimize in the cloud or modern environment.

Knowledge is of no value  
unless you put it into practice.

Anton Chekhov

# Migration Versus **Optimization**

While it's tempting to front-load optimization into the migration pattern it is rarely the most efficient approach. There are better tools to optimize in the cloud or modern environment.



## ✓ We All Pay A Knowledge Tax

Optimizing navigation, organization, access and more to organization knowledge **is valuable**. We all benefit from knowledge as do our organizations, but someone has to pay to optimize it from time to time as industries, our organization, and technology changes.

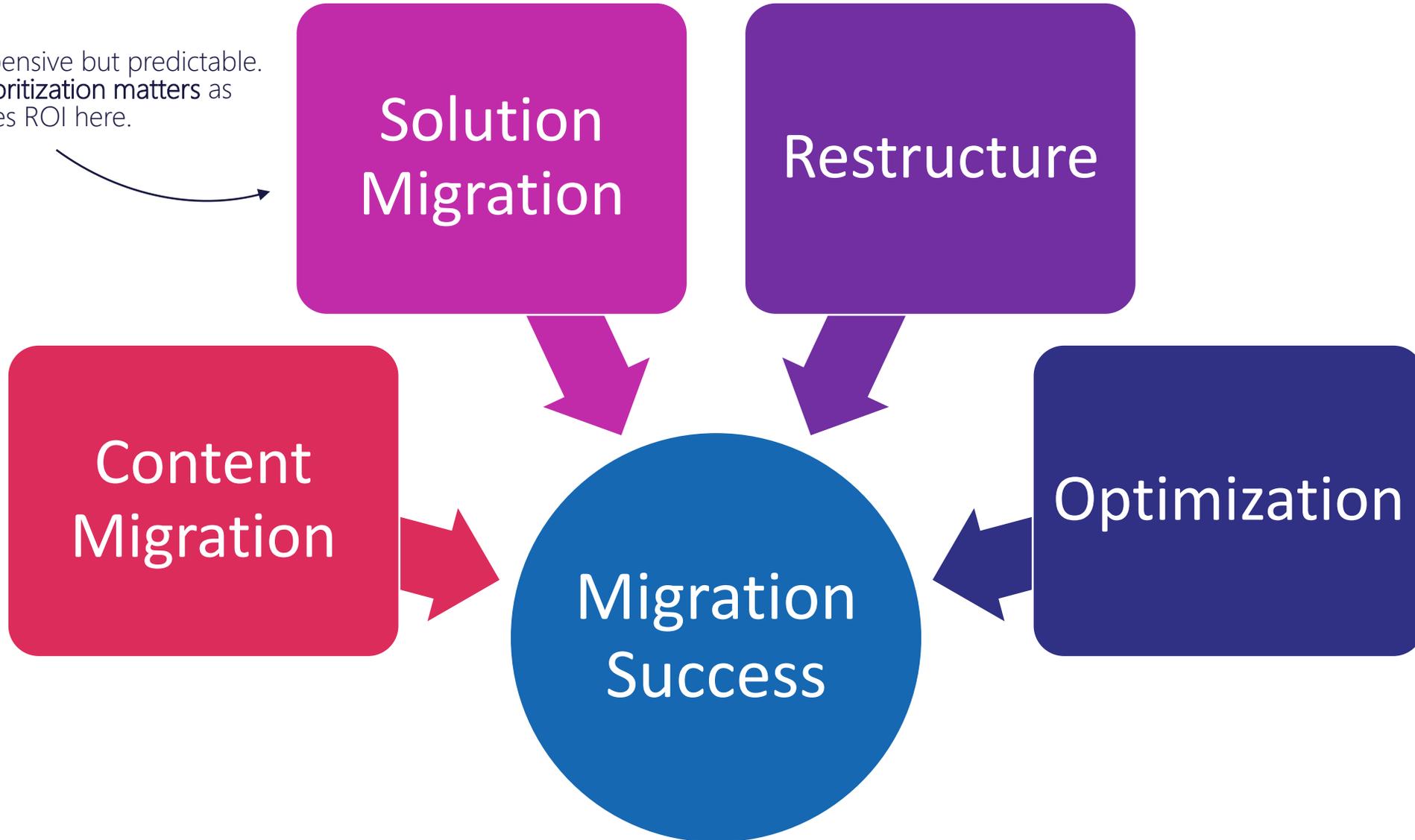


# Migration Versus **Optimization**



While it's tempting to front-load optimization into the migration pattern it is rarely the most efficient approach. There are better tools to optimize in the cloud or modern environment.

Expensive but predictable.  
Prioritization matters as  
does ROI here.



# Migration Versus **Optimization**



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Solution  
Migration

Restructure

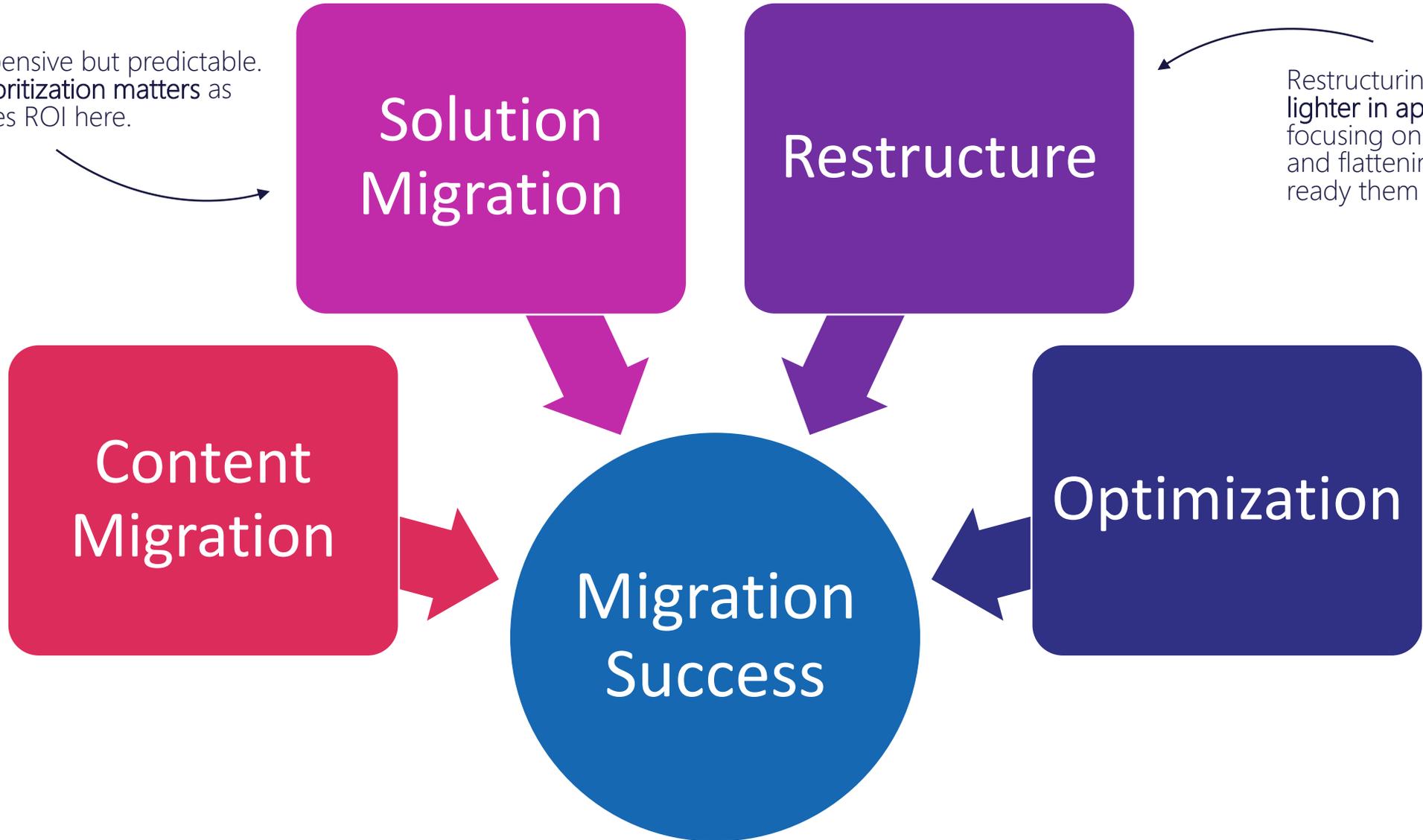
Restructuring can be  
**lighter in approach**  
focusing on permissions  
and flattening sites to  
ready them for Teams etc.



Content  
Migration

Optimization

Migration  
Success





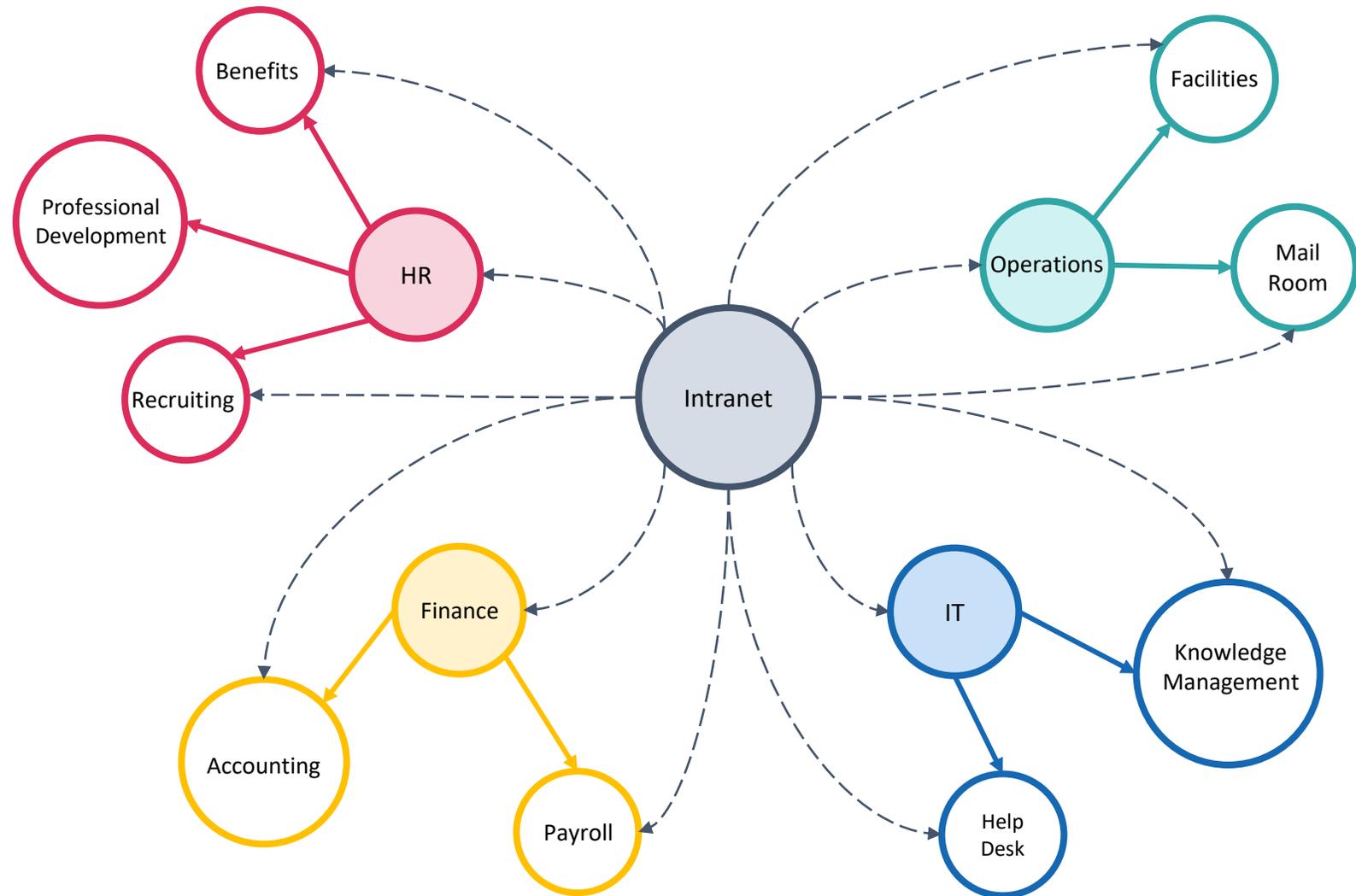
# Foundational Restructure

Establish a consolidated foundation from which to grow.



## ✓ Flatten First

Security does matter and it's important you don't lose security fidelity, but even in a lift and shift it's important to 'flatten' and optimize some security patterns to embrace the M365 model (Teams, Hubs, etc).





# Foundational Restructure

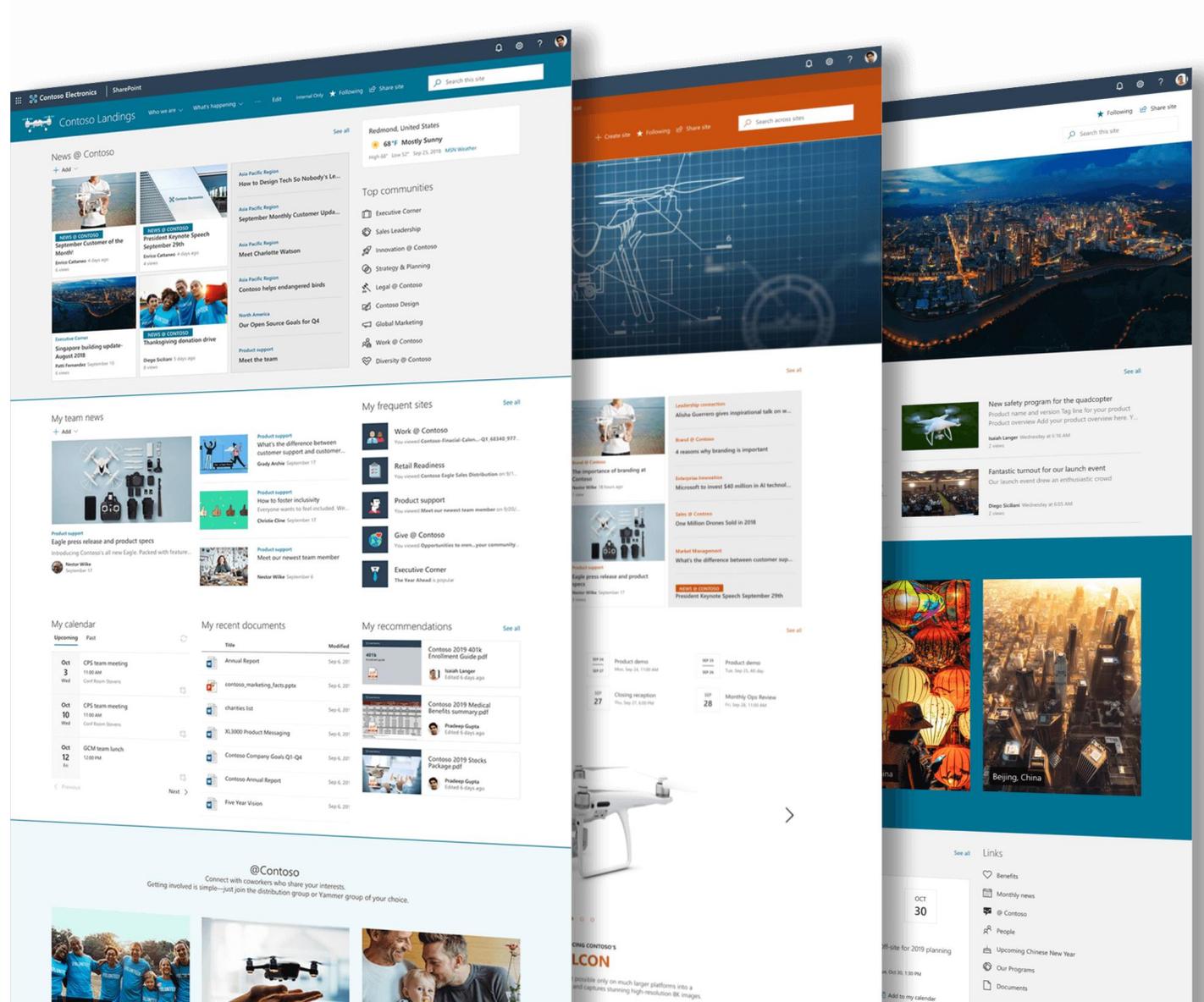
Establish a consolidated foundation from which to grow.



## ✓ Template Modern Targets

Start with modern templates that provide consistent layouts and configuration that are fit for purpose with your needs and allow for immediate reusability as your footprint grows.

Many collections of content can be migrated without pages or solutions meaning modern sites, teams and more improve the experience and require less migration effort.



# Migration Versus **Optimization**



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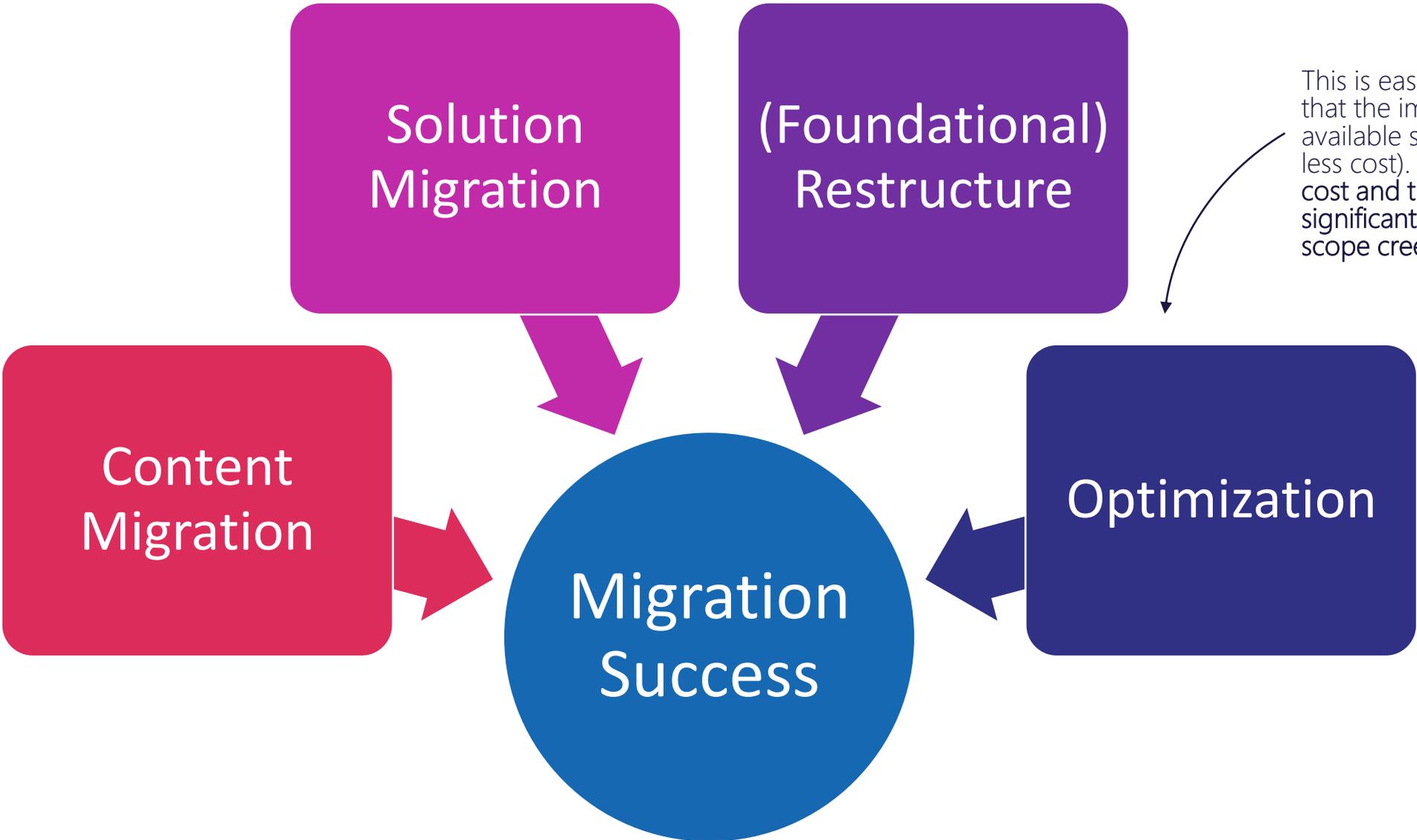
Migration  
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# Migration Versus **Optimization**

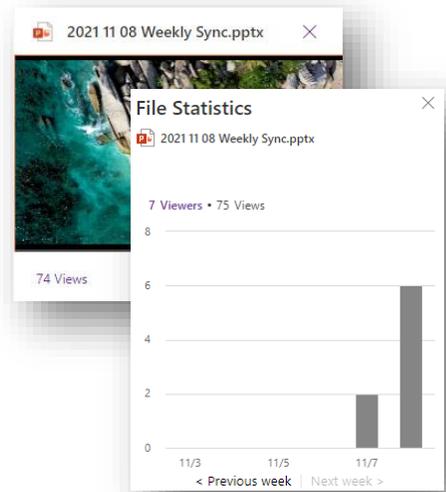


While it's tempting to front-load optimization into the migration pattern it is rarely the most efficient approach. There are better tools to optimize in the cloud or modern environment.



This is easier in the cloud and means that the improved experiences are available sooner to more people (at less cost). **Optimization is the biggest cost and the most likely to lead to significant (if not near-never ending) scope creep.**

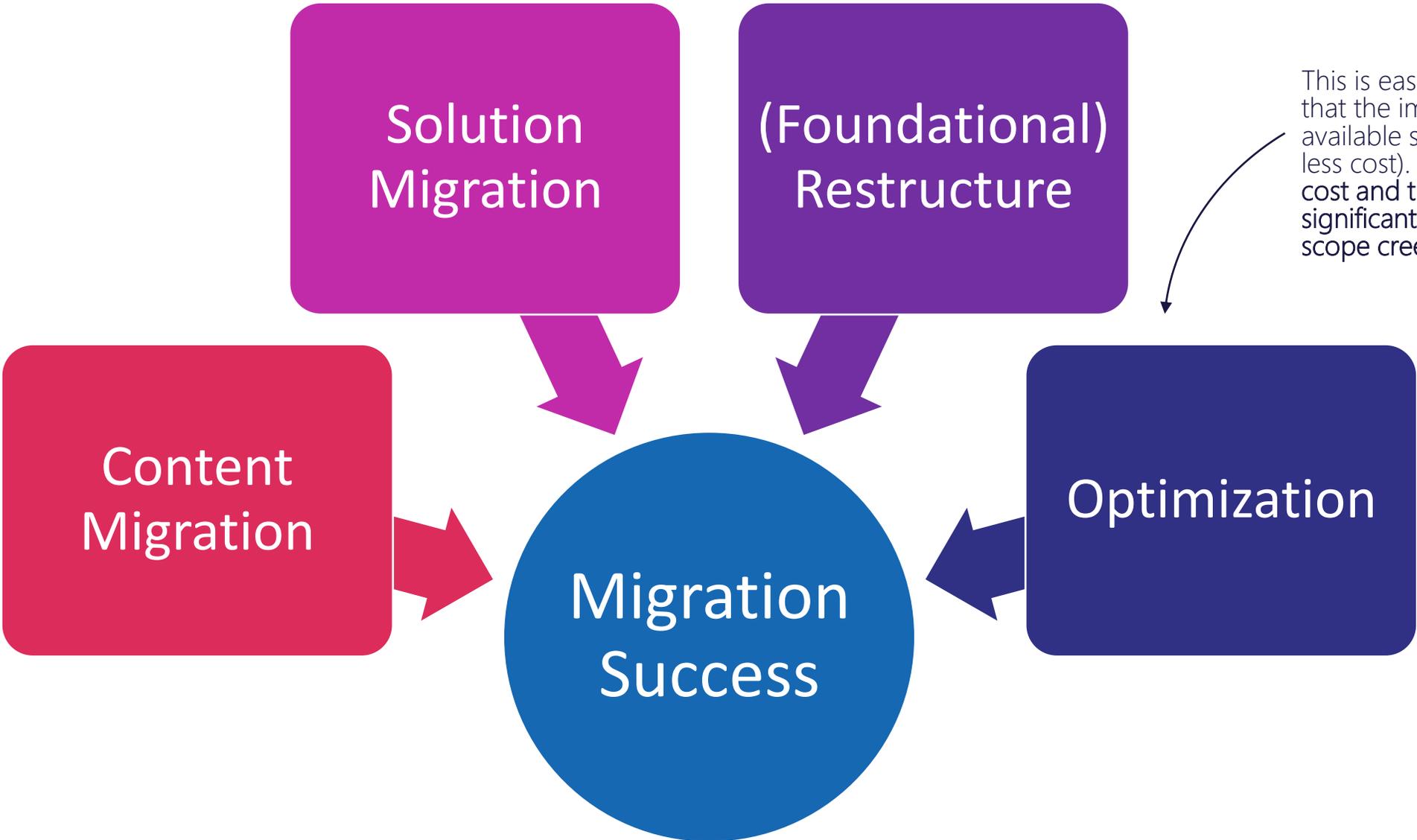
*Example: Content owners have better visibility into things like **view counts** to help optimize content in the cloud.*



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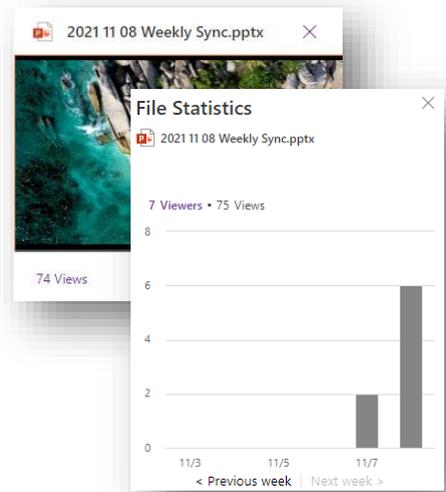


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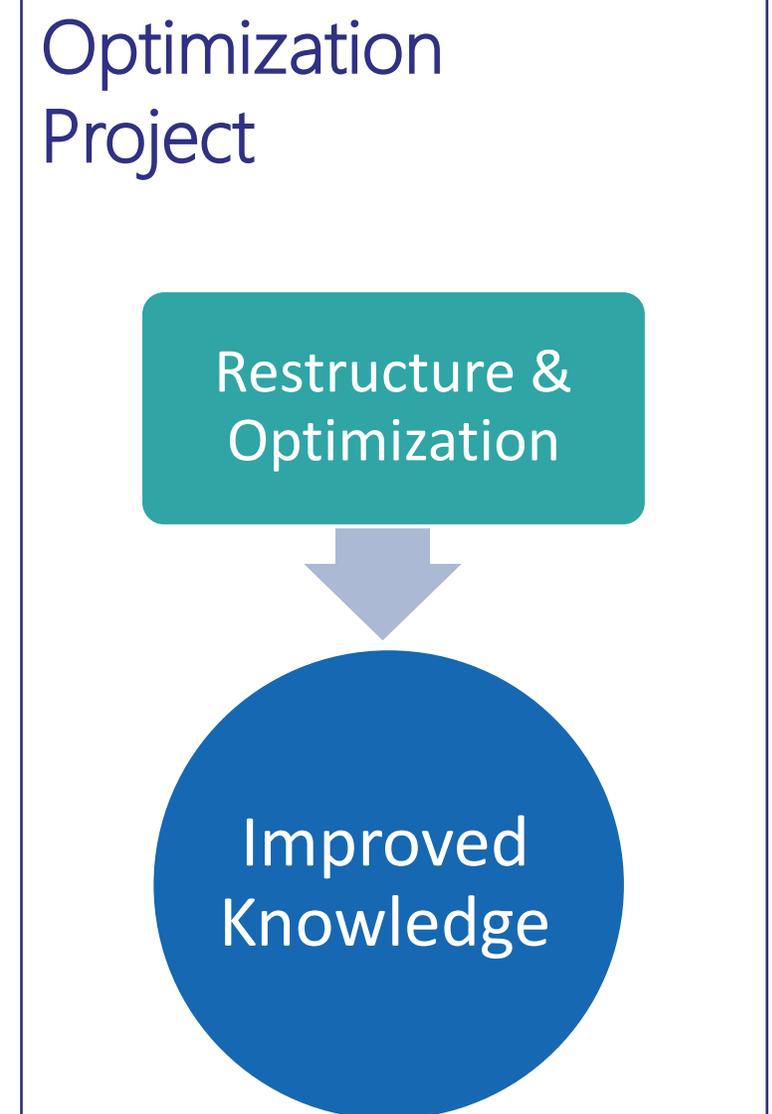
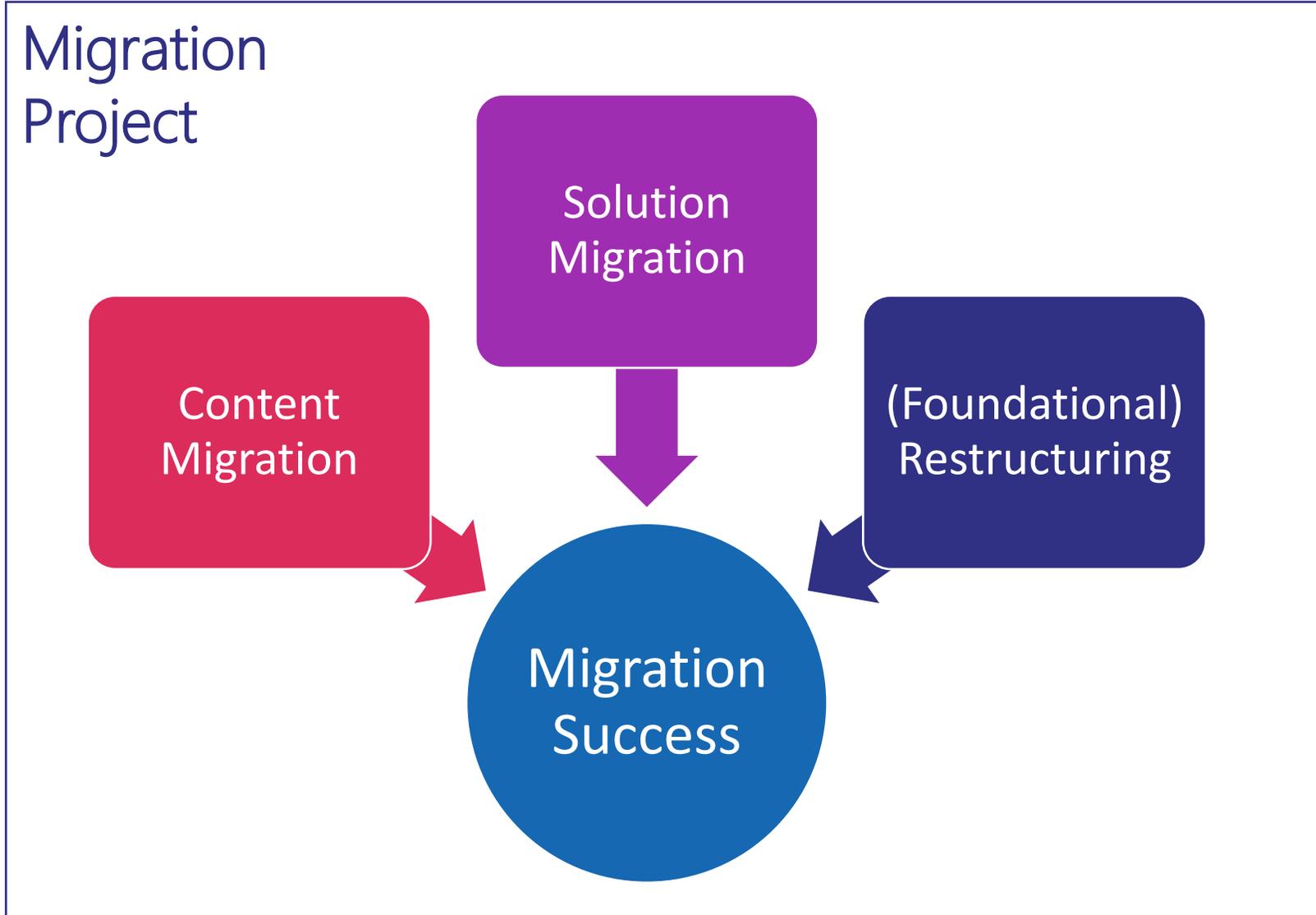
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# Migration Versus **Optimization**



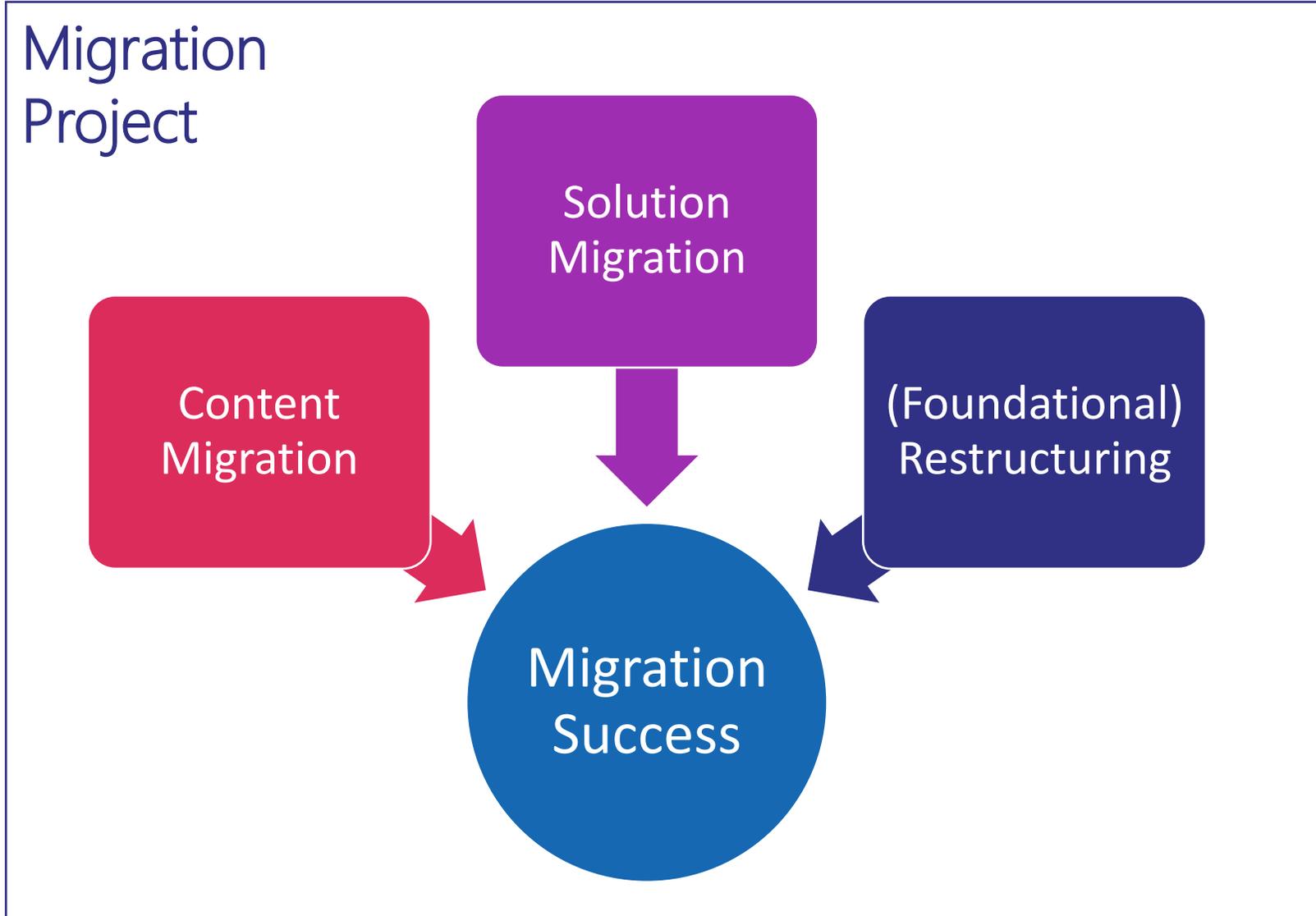
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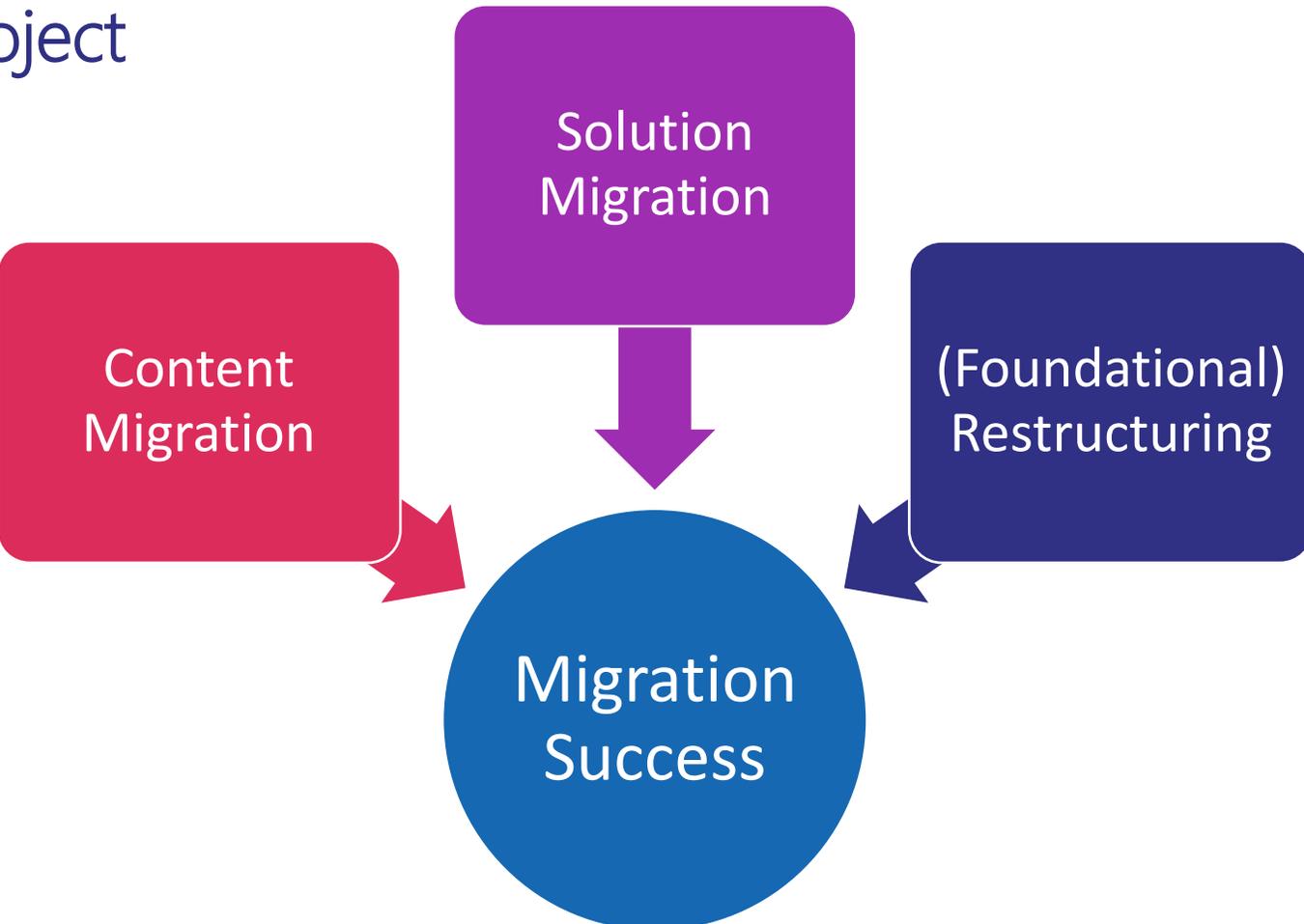


# Migration Versus **Optimization**



While it's tempting to front-load optimization into the migration pattern it is rarely the most efficient approach. There are better tools to optimize in the cloud or modern environment.

## Migration Project



## Optimization Services



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A: Provisioning, Lifecycle & More From The Start.

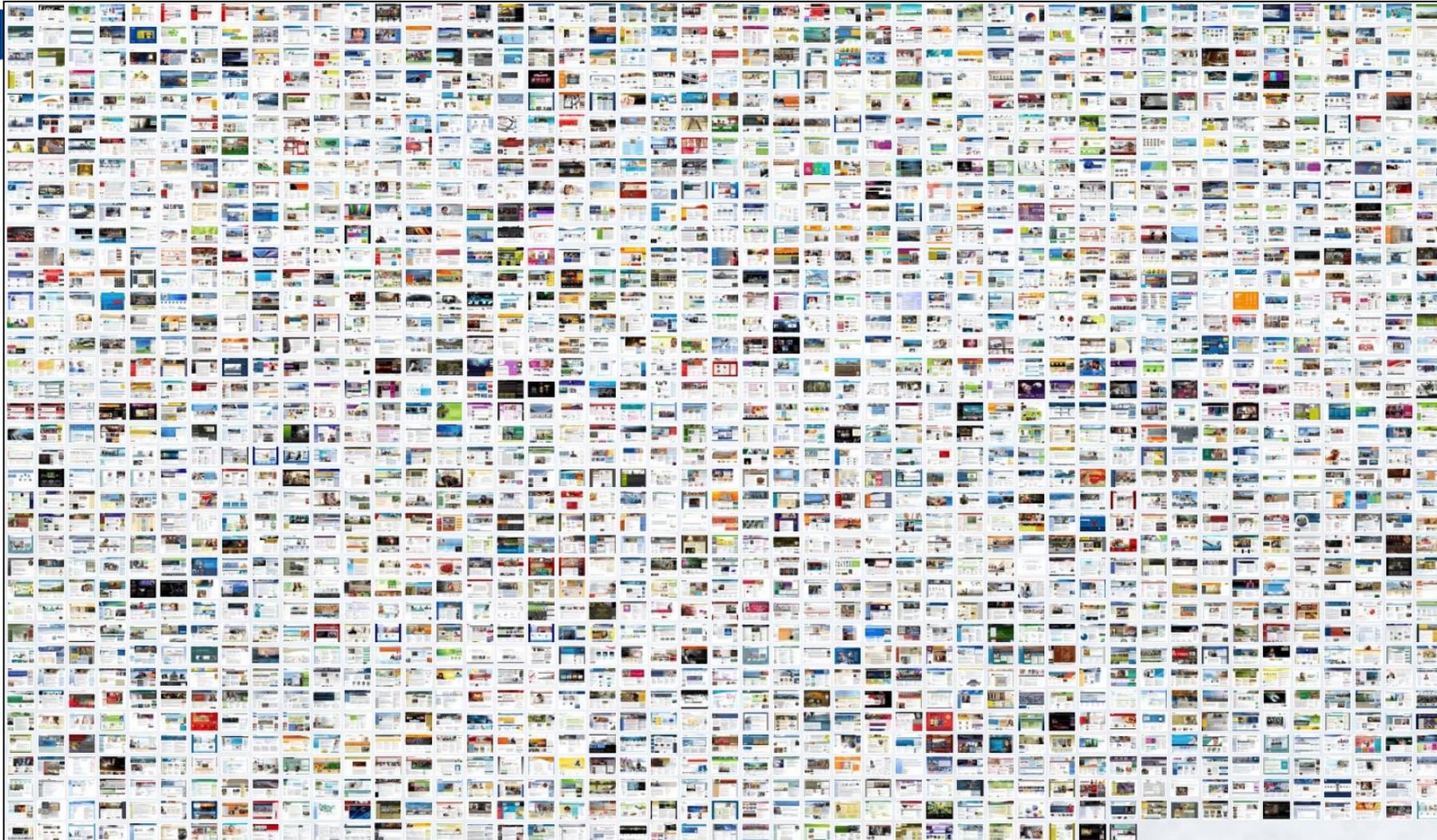


IT Leaders

# PROBLEM: CONTENT GROWS OVER TIME...



The modern digital workplace and Intranet has a continually increasing number of digital spaces or 'sites' where content is stored and shared.



# PROBLEM: CONTENT GROWS OVER TIME...



Most organizations don't know who created a digital space (SP Site, Team, Yammer Community, etc). What was its purpose? It's department? It's product, client, project, etc?

The screenshot shows a SharePoint navigation pane with a search bar at the top containing '/goto' and 'Sales'. The list of sites includes:

- Sales Team
- Sales & Marketing Operations
- Sales Solutions
- Sales Management Sales Team
- Sales and Marketing Careers
- Sales Management
- Marketing Operations
- Sales Solutions
- Sales
- Sales and
- Sales & Marketing Operations
- Sales Solutions
- Sales Management Sales
- Sales and Marketing

A red arrow points from a text box on the right to the 'Sales Management' site in the list.

As an end user this makes navigating these spaces extremely challenging.

*Think it's better as an administrator or digital workplace/intranet leader? It's not.*

# PROBLEM: CONTENT GROWS OVER TIME...



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SharePoint admin center

## Active sites

Use this page to manage all your sites. [Learn more](#)

[+](#) Create [↓](#) Export

Site name ↑	URL ↓		
Hub	.../sites/athhub		
Hub	.../sites/AAAhub		
Hub	.../sites/BBBhub	0.01	Boris Baitsov
Hub	.../sites/BALhub	0.01	Boris Baitsov
Hub	.../sites/CAShub	21.67	Kanwal Khinple

As an end user this makes navigating these spaces extremely challenging.

*Think it's better as an administrator or digital workplace/intranet leader? It's not.*

# SOLUTION: LEVERAGE OOTB NAVIGATION?



With improvements coming to global menu design can we leverage that to fill the hub mega menu gaps? ADD your own app to this bar for a DIRECTORY as these default ones are not sufficient.

**Contoso Electronics**

- Quick Access
- Organization Info
- Benefits
  - Contoso Works
  - Company Store
  - Health & Fitness
  - Learning Portal
  - Give
- Events
- Policy
- Support Services
- Resources

Global navigation

**My Sites**

- Frequent
  - The Landing
  - Leadership Connection
  - Contoso News
  - The Perspective
  - Consumer Research
  - Marketing
  - See all
- Followed
  - Retail Operations
  - Consumer Retail
  - Consumer Research
  - Marketing
  - Contoso Team
  - See all

Frequent and Followed Sites

**My News**

- Recommended
  - Lead with purpose  
Grady Archie Aug 28
  - Tech support: community helping...  
Christie Cline Aug 28
  - Contoso Life  
Allan Deyoung Aug 28
  - Paris launch set  
Bianca Pisani Aug 28
  - Health and wellness: Ergonomic tools...  
Megan Bowen Aug 28
  - Testing and quality control  
Isaiah Langer Aug 28
  - Executive Q&A Forum  
Adele Vance Aug 28
  - Trip report: India

Recommended News

**My Files**

- Recent
  - Contoso Annual Report.pptx  
sites > Global Sales
  - Press Release.docx  
teams > Product Launch Event
  - Digital Marketing Trends Report v2  
teams > Product Launch Event
  - Preliminary Budget.xlsx  
teams > Finance web
  - Social media content tracker  
sites > Marketing > Social Media
  - Meeting Notes  
OneDrive > MyDocuments > Notes
  - Competitor Analysis  
OneDrive > MyDocuments > Reports
  - Services Proposal  
Clients > Shared documents > 2019 > Smith
  - Financial Report Details  
OneDrive > MyDocuments > Reports
  - 2017 Client Proposal template  
Clients > Shared documents > 2017 > Smith
  - Promotions Campaigns  
teams > Product Launch Event
  - Financial Model.xlsx  
teams > Finance web
  - Lessons Learned  
sites > Marketing > Social Media

Recent Files

● Out Of The Box

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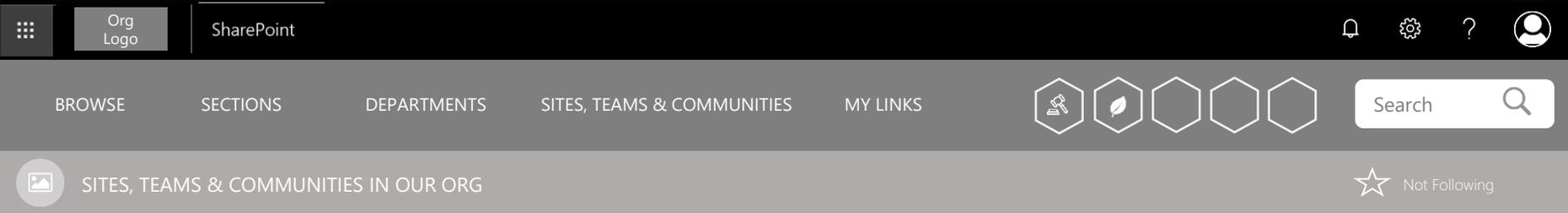
The screenshot displays a Microsoft Teams hub page for a group named 'Contoso'. The interface includes a search bar at the top with the text 'Search or type a command'. On the left, a navigation pane lists various sections: 'Quick Access', 'Company Information', 'Social Impact', 'Career', 'Benefits', 'My Sites' (with sub-items like 'Accessibility Central', 'Quality Assurance', 'Giving Campaign', 'Diversity & Inclusion', and 'Online Strategic Engagements'), and 'Recommended News'. The main content area features a header 'The Landing' with a search icon and a 'Public Group | General | English' indicator. Below the header are several content tiles: 'Taking flight: Student mentorship opportunities at Contoso', 'Contoso Mark 8: See the world through a whole new perspective', and 'Washington scheduled update to drone laws'. A 'Recommended viewing' section at the bottom shows video thumbnails. On the right side, there are widgets for 'Local weather' (Contoso HQ, 56°F, Mostly Sunny) and 'Global time' (Contoso HQ, 6:43 AM; Contoso Singapore, 9:43 PM, 15h ahead). A 'Hot topics' section is also visible at the bottom right.

● Out Of The Box

# SOLUTION: DIRECTORY EXPERIENCES!



What is shown below is a really simple mockup of a filtered OOTB site directory experience. You can create many pages with different views/visuals and relevant links to resources (Team, Site, Yammer, etc.)



Our communities can be filtered or explored by hierarchies ([site explorer](#)), by focus area ([topic map](#)), by the ones you recently visited or have favorited ([your sites, your teams, your communities](#)) or by filtering the columns below (just click the column header).

Link	ID	Community Manager(s)	Practice Groups	Date Created	Category	Private	Owner
<a href="#">International Bank Of Banking</a>	EB001	Strange, Stephen; Connor, Sarah; Ripley, Ellen	Corporate Securities	11/16/2018	RFP	Y	Snow, John
<a href="#">Travis County, Washington</a>	TCT001	Opel, Glenn; Knight, Misty; Allen, Tim; Banner, Bruce; Marco, Polo, Rambo, John	Litigation; Environmental	11/15/2018	RFP	Y	Jones, Jessica
<a href="#">Gotham Housing Authority</a>	SAH012	Balboa, Rocky	Government; Real Estate	11/03/2018	Pitch	Y	Jones, Jessica
<a href="#">Harbridge Corp</a>	HIL003	Parker, Peter; Spector, Marc; Segal, Steven; Bond, James	Trademark & Copyright	10/30/2018	Proposal	N	Danvers, Carol
<a href="#">Metropolis Independent School District</a>	DIS020	Brooks, Mel; Knight, Misty; Grey, Jean; Banner, Bruce	Public/Education Law	10/27/2018	RFP	N	Jones, Jessica
<a href="#">International Bank Of Banking</a>	EB001	Strange, Stephen; Connor, Sarah; Ripley, Ellen	Corporate Securities	11/16/2018	RFP	Y	Snow, John
<a href="#">Travis County, Washington</a>	TCT001	Opel, Glenn; Knight, Misty; Allen, Tim; Banner, Bruce; Marco, Polo, Rambo, John	Litigation; Environmental	11/15/2018	RFP	Y	Jones, Jessica
<a href="#">Gotham Housing Authority</a>	SAH012	Balboa, Rocky	Government; Real Estate	11/03/2018	Pitch	Y	Jones, Jessica
<a href="#">Harbridge Corp</a>	HIL003	Parker, Peter; Spector, Marc; Segal, Steven; Bond, James	Trademark & Copyright	10/30/2018	Proposal	N	Danvers, Carol

*\* Public by default scales and works better in the long run*

OOTB Lists and web parts can give you directory experiences if you simply store the data from the request process (approved or already created spaces).





# Navigating Your Sprawl Effectively



Design and implement a simplified experience that gives you quick access to teams, sites, communities, and more. Complimenting your Intranet and Digital Workplace Strategy. [www.M365Sprawl.com](http://www.M365Sprawl.com)

The screenshot shows the Waypoint application interface. At the top, there is a search bar with the text "Search or type a command" and a user profile icon. Below the search bar, the "Waypoint" logo is followed by navigation links: "Navigate", "Directory", and "About". The main content area is titled "Workspaces" and features a search bar with the text "Find" and a search icon. To the right of the search bar are sorting options: "Created ↓" and "Filter (2)". The workspace list is organized into columns: "Name", "Description", "Type", and "Department". Each row represents a workspace with a star icon, a letter code, a name, a description, a type icon and name, and a department name.

Name ↓	Description	Type ↓	Department ↓
☆ AN Alpha Nine Project	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Communication Site	Technical Services
☆ A Accounting	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Team Site	Finance & Accounting
☆ BT Birch Tree Project	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Communication Site	Technical Services
★ C Communications	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Team Site	Brand
☆ CM <b>Spotlight Change Management CoP</b>	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Project Management Office
☆ E Engineering	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Technical Services
☆ F Finance	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Finance
★ M Manufacturing	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Microsoft Team	Technical Services
☆ M <b>Spotlight Marketing</b>	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Classic Site	Brand
★ O Operations	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Team Site	Operations
☆ QA Quality Assurance	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Communication Site	Technical Services
☆ R Research	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Classic Site	Innovation

# AvePoint Teamwork Provisioning & Navigation Directory



Configure and plan for additional workspace metadata to assist users in navigating and exploring their digital workspaces. AvePoint has both a provisioning framework and integrated experiences for navigating workspaces.

The screenshot displays the Microsoft Teams interface with the MyHub workspace navigation directory. The top navigation bar includes the Microsoft Teams logo, a search bar, and a user profile icon. The MyHub workspace is active, showing tabs for Chat, Home, and About. The Hubs section is visible, featuring a search bar and a 'Create a workspace' button. Below the search bar, there are six workspace cards, each representing a different workspace. Each card includes a circular icon with a letter, a Microsoft Team logo, the workspace name, a list of team members, and a 'More details' link. The workspace cards are: Contoso (42 minutes ago), Digital Initiative Public Relations (Over a month ago), Laptop Refresh Project (46 minutes ago), M (partially visible), R (partially visible), and AC (partially visible). The left sidebar contains navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, MyHub, and Help.

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The screenshot displays the Microsoft Teams interface. At the top, the 'Microsoft Teams' header includes a search bar and a user profile icon. Below this, the 'MyHub' workspace is active, with tabs for 'Chat', 'Home', and 'About'. A 'Hubs' sidebar on the left contains a search bar and a dropdown menu with the following options: 'Pinned hubs', 'Default hubs', 'All workspaces', 'Favorite workspaces', 'Joined workspaces', and 'Saved hubs'. The main content area shows a grid of workspace cards. Two cards are fully visible: 'Digital Initiative Public Relations' (created over a month ago) and 'Laptop Refresh Project' (created 51 minutes ago). Each card features a team name, a creation timestamp, a title, a row of member avatars, and a 'More details' link. At the bottom of each card is a row of icons for information, favorites, share, add, email, and edit. A 'Create a workspace' button is located in the top right corner of the workspace view.

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Name	Last access time	Tag	Action
Contoso	45 minutes ago		
Digital Initiative Public Relations	Over a month ago		
Laptop Refresh Project	49 minutes ago		
Mark 8 Project Team	Over a month ago		
Retail	Over a month ago		
All Company	Today		
Ask HR	Today		
CEO Connection	Over a month ago		
Contoso Life	Over a month ago		

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Name	Last access time	Tag	Action
Contoso	45 minutes ago		Conversations, Calendar, Files, Notebook, Site, Planner, Team
Digital Initiative Public Relations	Over a month ago		
Laptop Refresh Project	50 minutes ago		
Mark 8 Project Team	Over a month ago		
Retail	Over a month ago		
All Company	Today		
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**Microsoft Teams** Search

**MyHub** Chat Home About

Hubs

All workspaces Search in Hubs

**Hubs**

Contoso (49 minutes ago)

Digital Initiative Public Relations (Over a month ago)

**Create a hub**

- Pin this hub for quick access
- Set this as the home hub

Create hub by

- Filter workspaces
- Manually add workspaces

Microsoft Teams

Include teams with the properties below:

- Public
- Private
- Marked as favorite
- I'm a member of
- I'm an owner of

Filter by tags

Select a tag

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The screenshot displays the Microsoft Teams interface. At the top, the 'Microsoft Teams' header includes a search bar and a user profile icon. Below this, the 'MyHub' section is visible, featuring tabs for 'Chat', 'Home', and 'About'. The 'Hubs' area shows a grid of workspace cards, including 'Contoso' and 'Digital Initiative Public Relations'. A 'Create a hub' dialog box is open on the right, allowing users to configure a new hub. The dialog includes options to pin the hub, set it as the home hub, and choose between filtering workspaces or manually adding them. A search bar and an 'Add' button are provided for selecting workspaces. Below the search bar, a message states: 'Nothing has been added. Click "Add" to add workspaces to this hub.' At the bottom of the dialog, there are toggle switches for 'Microsoft 365 Groups' and 'SharePoint Sites'.

**Microsoft Teams** Search

**MyHub** Chat Home About

Hubs

All workspaces Search in Hubs

**Hubs**

Contoso 51 minutes ago

Digital Initiative Public Relations Over a month ago

**Create a hub**

- Pin this hub for quick access
- Set this as the home hub

Create hub by

- Filter workspaces
- Manually add workspaces

Microsoft Teams

Search Add

Nothing has been added. Click "Add" to add workspaces to this hub.

Microsoft 365 Groups

SharePoint Sites

# AvePoint Teamwork Provisioning & Navigation Directory



Configure and plan for additional workspace metadata to assist users in navigating and exploring their digital workspaces. AvePoint has both a provisioning framework and integrated experiences for navigating workspaces.

The screenshot displays the Microsoft Teams MyHub interface. At the top, there is a search bar and navigation tabs for 'MyHub', 'Chat', 'Home', and 'About'. A vertical sidebar on the left contains icons for Activity, Chat, Teams, Calendar, Calls, Files, MyHub, and Apps. The main content area is titled 'Hubs' and features a search filter set to 'All workspaces' with a dropdown arrow and a search input containing 'Contoso'. To the right of the search bar are icons for refresh, settings, notifications, help, and share, along with a 'Create a workspace' button. Below the search bar, a grid of workspace hubs is displayed. Each hub card includes a circular icon with a letter, a title, a description, a timestamp, a profile picture, and a 'More details' link. The visible hubs are: 1. 'Contoso' (purple icon 'C'), 'Microsoft Team', 'An hour ago', profile picture of five people. 2. 'Contoso Life' (grey icon 'CL'), 'Yammer Community', 'Over a month ago', profile picture of one person. 3. 'Parents of Contoso' (blue icon 'PC'), 'Yammer Community', 'Over a month ago', profile picture of one person. At the bottom of the screen, the top of three more hub cards are visible with icons 'cl', 'cl', and 'c2'.

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The screenshot shows the Microsoft Teams interface with the MyHub app open. The MyHub app has a 'Tag management' section with a search bar and a table of tags. A modal window titled 'Workspaces applied with the tag "contoso"' is open, displaying a list of workspaces with their status and an action column.

**Microsoft Teams** Search [MA]

**MyHub** Chat Home About

Hubs

### Tag management

Search...

Tag name	Created time	Applied to workspaces
contoso	2020-07-16 15:09:59	6

1 result shown

### Workspaces applied with the tag "contoso"

Remove the tag

Workspace	Status	Action
Contoso Landings	<input type="checkbox"/>	×
Contoso	<input checked="" type="checkbox"/>	×
Contoso Web 2	<input checked="" type="checkbox"/>	×
Contoso Web 1	<input checked="" type="checkbox"/>	×
Parents of Contoso	<input checked="" type="checkbox"/>	×
Contoso Life	<input checked="" type="checkbox"/>	×

6 results shown



Embrace patterns like improved Governance such as recertification, security attestations, reviews, and programmatic IT management so that your new environment scales more effectively.

## Policy Management

+ Create Refresh

Policy	Status
New Private Team	Active
Gold	Active
Bronze	Active
Silver	Active

### View Details: Gold

Copy Deactivate

Enable automated ownership election process:	No
--	----

#### Recertification or Renewal

Enable recertification or renewal:	Yes
Profile Type:	Recertification
Recertification profile name:	Permission Review

Enabled permission recertification:	Yes
Excluded Permissions:	None
Recurrence:	Every 1 days
Approval Process:	Default Approval Process
Enabled metadata recertification:	No
Enabled ownership recertification:	No

Search Show rows: 15 1/1

st Modified Time
20-05-13 15:10:36
20-05-12 17:46:53
20-04-30 13:55:56
20-04-30 13:55:56

# Teamwork Provisioning & **Navigation Directory**



Embrace patterns like improved Governance such as recertification, security attestations, reviews, and programmatic IT management so that your new environment scales more effectively.

The screenshot displays the 'Cloud Governance' interface. On the left is a navigation sidebar with options: Home, Workspaces, Requests, Quick requests, and View all. The main content area is titled 'To-do list' and is divided into two columns: 'Approvals' and 'Confirmations'. Both columns have a 'Due date' dropdown menu. The 'Approvals' column contains two items: 'New Library for my Spreadsheets' (Create Library/List) by Adele Vance, which is marked as 'Expired' with a red clock icon, and 'Please Create a Knowledge Sharing Site' (Create Site Collection) by Adele Vance. The 'Confirmations' column contains two items: 'My Partner Engagement Site site collectio...' (Site Collection Lifecycle Management) and 'Permission Recertification for Site Collecti...' (Permission Recertification), both marked as 'Waiting for Approval'.

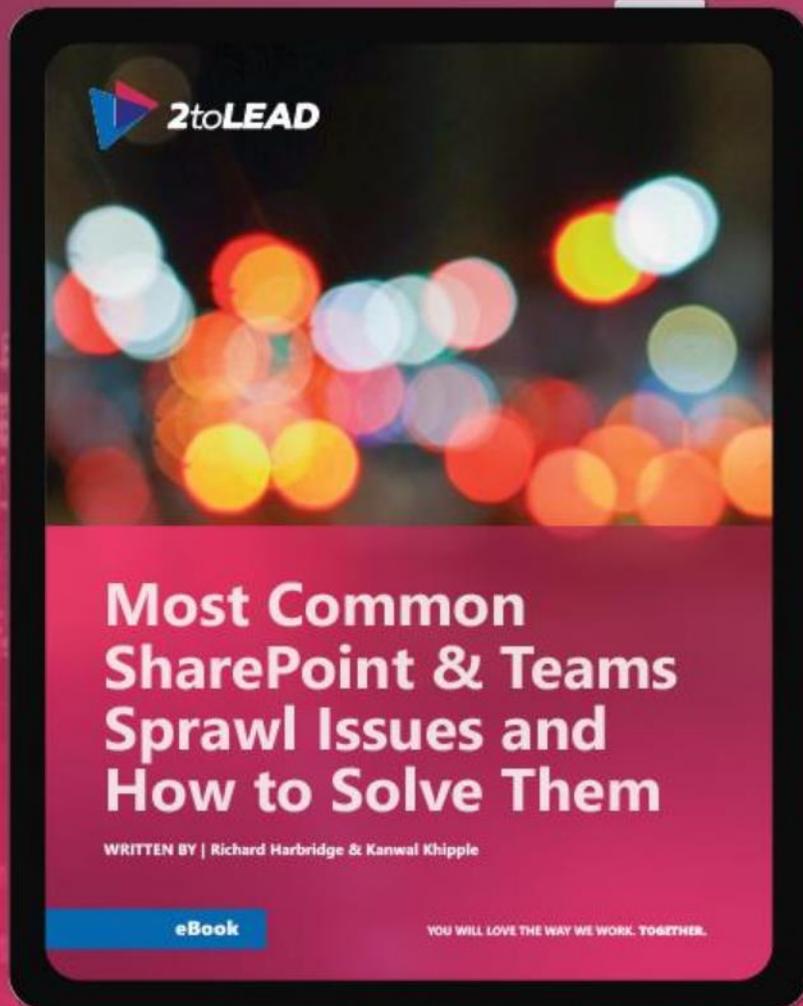
# Teamwork Provisioning & **Navigation Directory**



Embrace patterns like improved Governance such as recertification, security attestations, reviews, and programmatic IT management so that your new environment scales more effectively.

The screenshot displays the 'Cloud Governance' interface. On the left is a navigation sidebar with options: Search in All, Home, Workspaces, Requests, Quick requests, and View all. The main content area shows a 'Site collection permission rec...' dialog with a 'Cancel' button and a 'Reset' button. Below this, a list of site collections is shown, with 'ABC Initiative Owners' selected. Below the list, it states '5 members in the group' with a link to 'View group members'. A modal window titled 'View group members: ABC Initiative Owners' is open, showing a table of group members. The table has columns for 'Display name' and 'Account type'. The members listed are Adele Vance, Bianca Pisani, Debra Berger, Megan Bowen, and Raul Razo, all with 'User' account types. Megan Bowen and Raul Razo are selected with blue checkmarks. At the top of the modal, there are buttons for 'Change group', 'Remove user from group', and 'Remove user from site collection'. The user's initials 'MA' are visible in the top right corner of the interface.

Display name	Account type
Adele Vance	User
Bianca Pisani	User
Debra Berger	User
<input checked="" type="checkbox"/> Megan Bowen	User
<input checked="" type="checkbox"/> Raul Razo	User



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It's difficult, costly and time consuming to plan for risks.

A: Don't Do This Alone. Leverage MSFT & Partners

We have sites, customizations, workflows, forms and more.

A: Everyone Does. Priority Matters Here Most.

I don't have a way to efficiently modernize or optimize all of it.

A: Two Projects. Migration & Optimization.

How will we stop this from being a mess again and unmanaged?

A: Provisioning, Lifecycle & More From The Start.



IT Leaders

Migration

What else **matters?**



Why should we use it for more than documents and sharing?

How do we improve search, navigation or "find-ability"?

**There is so much more we could discuss!**

How do we organize, manage or improve "put-ability"?

How much help is needed?  
Can we speed this up?



**Business Leaders**



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**Thank you!**