Moving Messaging and Collaboration to Office 365: It's Not All Sunshine and Rainbows

Office 365 offers many benefits, but migrating to it can be tricky. Learn here how to overcome the challenges of making the move.

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Since you've chosen to read this whitepaper, it's probably safe to say you're considering moving your current Exchange and/or SharePoint messaging and collaboration to Office 365's Exchange Online and SharePoint Online platform. Office 365 has the allure of mobility, ease of use, simplified administration, and lowered costs—making it an excellent choice.

But, the larger concern is how difficult will it be to get there?

Like any migration, you already recognize that there will be planning, challenges, mistakes, and even some major changes along the way. So knowing what trials lie ahead will be helpful, so you can plan accordingly now.

To put the migration (and all the challenges that come with it) into perspective, let's cover the migration from three different angles, comparing the pros and cons of each of these three angles:

- Benefits vs. Cost
- Reward vs. Risk
- The Plan vs. The Work

You'll notice the comparisons seem a bit backwards—to make sure you walk away with a realistic understanding of what's involved with a migration (and not just some rah-rah about how going to Office 365 is going to be "easier, cheaper, faster, etc.") we'll cover the pros first for each angle, and then cover the cons to bring some balance.

Please keep in mind this isn't a "how to" whitepaper; this paper is designed to assist in getting you thinking correctly about the often-overlooked pitfalls of a migration to Office 365 from the perspective of cost, the risks involved, and the real work to be done. Let's start with the most initial decision factor—cost—and weight it out against the benefits of Office 365.

MOVING TO OFFICE 365: BENEFIT VS. COST

Some of you may be thinking about Office 365 because the industry is simply trending towards cloud-based solutions to replace ones currently on-premises. So, it's important to fully understand why you'd

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want to go to Office 365 in the first place. And when you're done thinking about how great it will be, let's spend some time covering what the real costs will be to both get you there, and keep you there.

Benefits

The most obvious benefit to moving to Office 365 is one shared by just about all cloud-based solutions replacing something on-premises: moving the cost of managing and maintaining messaging and collaboration from a Capital Expense to an Operating Expense.

For those not familiar with the terms, the short primer goes like this: A capital expense is a major purchase (like a number of new servers) that the company will own and benefit from over a future period of time. An operating expense is simply an expense necessary to do day-to-day business (like the electrical bill) that the company pays on a, say, monthly or annual basis.

Your on-premises solutions require the purchase of hardware and software, which is a capital expense. There are two things wrong with this, when considering Office 365 as an alternative: first the hardware purchased will go underutilized, and the capital expense is usually more costly on an on-going basis than the operating expense of using Office 365.

For example, if you have 5,000 users and you want to purchase a server to handle email for those users, you won't buy just enough to service 5,000 users; you'll purchase something that has a larger capacity—say, 7,500. And the moment you hit 7,000, you'll repeat the process with a server that can service 9,000. See? You never fully utilize your purchase.

With Office 365, you exchange the large annual purchases for, in essence, "one easy monthly payment" (and operating expense) based on what you use with a specific expectation of service level. That's it.

Once you're on Office 365, you get to realize a lower total cost of ownership (TCO) as well, because you no longer purchase hardware, software, pay for offsite locations for DR, and have, essentially, outsourced support to Microsoft.

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It does sound great, doesn't it? But there are costs as well to consider in the move.

Costs

The topic of costs really isn't as simple as swapping out the purchase of servers and software with a monthly per-mailbox or per-user fee. When planning a move to Office 365, there are lots of both tangible and intangible costs you need to be aware of. Some of them are simply a product of the migration itself, while others are a by-product of the change in environments.

Migration Costs

We all know every migration is going to cost something. There are known tangible migration costs like paying for a migration tool and moving the mailbox or collaborative data. That's the easy part. The tougher part is defining the total cost around some of the less tangible aspects of a migration:

- **Migration Staffing**—Some of the staff may not have the experience necessary to ensure a successful migration, requiring additional contract help.

- **Velocity Issues**—Your executive team has expectations around how quickly the migration should take, which usually requires moving groups of users at once overnight. Based on that velocity (which often occurs too quickly), the migration may generate an influx of helpdesk calls the next morning, which can overwhelm IT staff.

- **Training**—Not every user is as savvy as you, so they may require varying levels of training around how to access and utilize Office 365. This can be especially true if you are introducing more Office 365 workloads than just email, such as SharePoint, Yammer, or OneDrive for Business.

- **Single Sign-On Implementation**—Many companies desire to maintain a sense of normalcy for their users, which includes not having to log on a second time to access their email. SSO provides this but does require hardware, software, setup, and user training.

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- **User Communications**—Often overlooked, someone should be responsible for communicating with the user base about the project, provide updates and information on training schedules, etc.

This is by no means an exhaustive list. But it does give you an idea of just some of the costs you need to plan for during a migration.

Environmental Costs

In addition to the tangible and intangible migration costs, there are also changes in the environment that will increase the cost of the migration, and ownership.

- **Client Deployments**—While some of you may have your users switch to a browser client to access email, others will have users continue to use Outlook for email. This will require, at a minimum, a standard update of the client configuration. Or, at a maximum, a redeployment of Outlook, depending on if you are looking to deploy a newer version of Outlook.

- **Network Enhancements**—Once on Office 365, users will be going out to the cloud for every email and every collaborative document, which may require both an increase in the bandwidth available, as well as upgrades to network hardware.

- **Integrated Applications**—Messaging and collaboration don't just have human clients. Applications designed to work with on-premises Exchange and SharePoint will need to be reconfigured to work with Office 365.

Making the Right Move

It's obvious, when looking at a migration to Office 365 from a cost perspective, there are both issues and advantages IT must quantify and build into the overall cost of migration. To minimize costs, it's important to ensure you have planned for every source of increased costs before, during, and after a migration and plan accordingly. Enlisting the help of an experienced partner will help better establish a true cost of migration.

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MOVING TO OFFICE 365: REWARD VS. RISK

Moving to Office 365 is more than just about cost savings. It's also about whether IT can provide a better service to its' customer (the user). So let's cover some of the operational rewards afforded by Office 365, and not forget to cover some of the risks to business operations that exist.

Rewards

When it comes to business operations, Office 365 provides some very compelling arguments. If you were to attempt to compare your current on-premises solution to Office 365, from an operations standpoint, you'd likely loose. Take the following examples of improved operations from the perspective of the user, and from IT.

From a user perspective, Office 365 is designed to provide highly available messaging and collaboration services with better accessibility anytime, anywhere, from any device. From a service perspective, users enjoy anywhere from similar functionality (as in the case of going from Exchange on-premises to Exchange within Office 365) to increased functionality if moving from something other than Office 365's on-premises counterparts.

From an IT perspective, you get simplified management, where hardware and software are no longer your concern. Daily management usually consists of simple creation of mailboxes and distribution lists, and maintaining security. You're no longer testing out backups and disaster recovery scenarios; you're simply focused now on far more critical business issues.

Once again, moving to Office 365 sounds like a no-brainer. So, is there a potential downside to business operations by moving to Office 365?

Risks

There are a number of technical aspects of the migration that can impact business operations negatively. So while you get the "always on and accessible Office 365," getting there may be riddled with operational disruptions, including:

- **Authentication**—you'll need to decide whether or not SSO is part of the post-migration environment and, regardless of choice, plan

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for training time. Otherwise, you'll be changing some part of the user's normal logon tasks without telling them how to get access.

- **Archiving**—if you're already archiving, you'll need to decide what happens once you're on Office 365. Are you moving everything to Office 365, starting greenfield (leaving everything that was on-premises in the existing archive), or integrating the two systems?

- **PSTs**—tied in with archiving is the ever-present use of PST files. If your migrated users are required to access Office 365 via a web browser, how, then do they access existing PSTs? You'll need to ensure users have access to these files in the same way they need access to archives.

- **Migration Failures**—a loss of data or a failure requiring a partial reversion mid-migration is a real possibility and can impact users. For example, Office 365 has limitations on attachment size, so ensure that you have a plan in place to recover or redirect anything that is not accepted.

The Greatest Risk—Loss in Productivity

Productivity should probably be highest on your list of concerns. Many of the unforeseen costs and the previous three technical risks have direct implications on a user's productivity. Let's face it; during this kind of migration, a lot can be changing for the user (perhaps not so much in the case of those with just an Outlook client).

Take a staged migration (where groups of users are migrated together with the entire migration taking a much longer period of time)—during that time, end users (both those that have been migrated and those that have yet to be) need a seamless experience of being on "one" messaging environment.

Some simple problems like unavailable or inaccurate Free/Busy information, issues with meetings, and mailboxes or calendars inaccessible by delegates—all spell out an administrative assistant not being able to do their job. Directory synchronization issues can cause the entire company to not see the entire directory.

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Imagine coming in next day after migration and all this has changed. Without proper communication throughout the project and training for when they are personally impacted by the project, users won't understand what's changed, will get lost, won't understand a new interface, etc. All adding up to a risk to productivity and the blame falling directly on IT.

Making the Right Move

Realizing that risks exist can have an impact on business operations is a critical step. Identifying each risk (regardless of how small the impact may be) and outlining where the negative impact will result helps to minimize and, hopefully, mitigate the risk. Seeking input from seasoned migration experts may help speed up the risk identification process, as well as ensure it is comprehensive.

MOVING TO OFFICE 365: THE PLAN VS. THE WORK

Behind every great migration is a plan that is more than just a list of tasks; it's a plan that includes every piece of data, every user, every system, every task and every contingency. But, to paraphrase a well-known quote, "even the best laid plans of migrations go astray."

Don't migration plans always go as designed?

The Plan

The move seems easy enough—purchase some licenses of Office 365, use the free migration utility, move the mailboxes and/or files for collaboration, give the users a "one-sheeter" on what to expect, and BAM!—you have yourself a migration, right?

Even when the plan looks good, if you've never done a migration to Office 365, there's a ton more work that will need to be done.

The Work

Performing the actual migration is never as simple as what was in the plan—that is, unless you start with the work to be done and then build plan around it. It sounds obvious, but all too often, plans are built without actually thinking through the work necessary, the places where failure is very possible, and the contingencies necessary.

Behind every great migration is a plan that is more than just a list of tasks.

The work can be broken into 4 simple phases: Preparation, Migration, Contingency, and Management.

Preparation

This is where assessment is critical before planning. You need to first assess the technology, infrastructure, people, staffing, and processes you have in place to determine if your plan needs to include upgrades, purchases, or outsourcing to accomplish the migration. A great example is the company with multiple domains. In order to simplify the overall migration an AD consolidation project becomes part of the plan.

This phase should also include both a proof of concept and a resulting plan for moving mailboxes, collaborative data, application integration, addressing archiving and PST issues, and the coexistence of both Office 365 and any impacted on-premises systems.

Migration

While you probably feel the most comfortable with this phase, as it should be the easiest, it's important to not underestimate the impact the move will have on the organization, and the flexibility needed throughout the migration. Communications and training have already been addressed here, but they need to be a critical part of the migration. Unforeseen exceptions, such as migrations consuming too much bandwidth during the business day, may result in changes in the plan.

Contingency

At a minimum, it's a reality from a planning perspective. Should those "best laid plans" not go so well, you need concrete strategies of how to get email or collaboration back up and running quickly. Without those contingency plans, erosion in IT confidence will occur. And you know what that means—just about everything that goes wrong from that point forward is because of the migration, departments begin to push back on migrating, and now you have an even greater challenge of getting the migration back on track.

Management

Once you've got some or all of your move to Office 365 complete, someone has to manage and optimize the new environment. Issues like security, license management, organization of SharePoint sites,

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meeting compliance, archiving, and the day-to-day management of mailboxes and sites all need to be addressed. Additionally, planning and testing of recovery has completely changed, requiring you to devise new methods to ensure you can recover as needed, should the opportunity arise.

Making the Right Move

The key here is for the plan to reflect the work, and not the other way around. It may sound a little confusing, but it's true. It may be a tough one for those of you who have never done a migration to Office 365, but the plan needs to be based on walking through all the work necessary throughout the migration. If you don't have the prior experience, seeking assistance may be in order.

GETTING TO THE SUNSHINE AND RAINBOWS

There's almost an impossible amount of detail to consider in this white-paper, and the topics discussed have only scratched the surface and don't even dig deep enough to address specific issues in your environ-ment. Remember, the purpose of this paper was to get you thinking about the migration properly, with a focus on planning—planning for the migration, planning for contingencies, planning for user issues, and planning for failure.

There are two paths to the land of sunshine and rainbows. One is to spend time taking some educated guesses and then proceeding with extreme caution. The other requires soliciting the experience of a trusted partner to assist in ensuring every last detail has been addressed. In either case, as long as you plan properly, you have an excellent chance of success.

ENSURE A SUCCESSFUL TRANSITION WITH DELL

One of the best ways to ensure a successful migration is to use Dell as a trusted partner. Dell has migrated more than 75 million AD accounts, more than 50 million mailboxes to Exchange and hundreds of terabytes of data to SharePoint. In gaining this vast experience, Dell has developed a proven methodology to ensure successful migrations that is built on four key pillars:

The plan needs to be based on walking through all the work necessary throughout the migration.

- **Prepare**—Get detailed pre-migration assessments that analyze the current state of your environment to ensure a successful, worry-free migration with no surprises. Understand what should and shouldn't be moved and consolidate or restructure your Active Directory before the migration to properly prepare for Office 365.

- **Migrate**—Mitigate the risk of data loss and minimize IT and end-user impact with a high-fidelity migration of data to various Office 365 workloads such as Exchange Online, SharePoint Online, Yammer, and OneDrive for Business.

- **Coexist**—Minimize the impact on productivity by ensuring true coexistence between migrated and un-migrated users throughout the migration.

- **Manage**—Stay in control of your new messaging and collaboration environment with auditing, reporting, recovery and email discovery in Office 365 or your hybrid environment.

Making the transition to Office 365 or a hybrid environment will have a direct impact on your users and the way they work.

Making the transition to Office 365 or a hybrid environment is a very important initiative for any organization to take on because it will have a direct impact on your users and the way they work. Choosing the right tools and the right partner are essential parts of the process. To find out how Dell can help ensure your successful transition to Office 365, visit **www.DellSoftware.com/ZeroIMPACT**.

With nearly 20 years of enterprise IT experience, Nick Cavalancia is an accomplished consultant, speaker, trainer, writer, and columnist and has achieved certifications including MCSE, MCT, MCNE and MCNI. He has authored, co-authored and contributed to over a dozen books on Windows, Active Directory, Exchange and other Microsoft technologies. He has spoken at conferences such as the Microsoft Exchange Conference, TechEd, Exchange Connections, and on countless webinars and at tradeshows around the world.

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