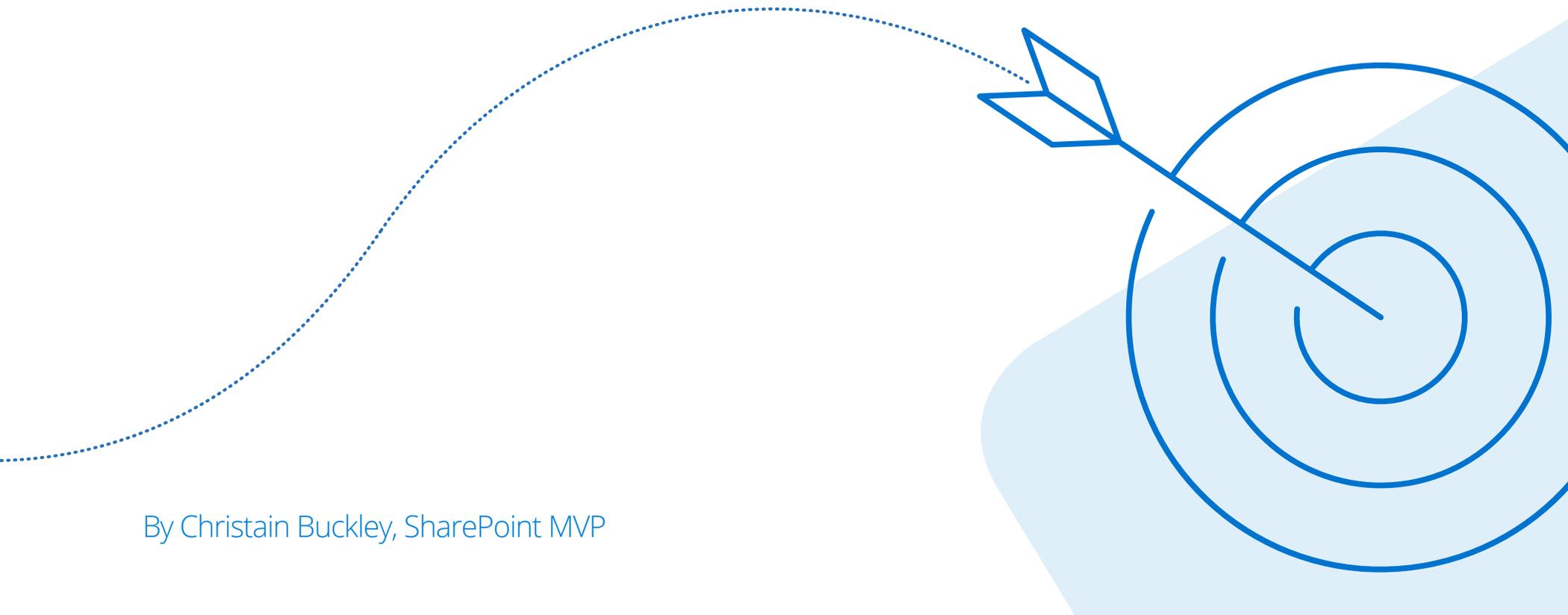


The
Definitive Guide
to better SharePoint migration planning



By Christain Buckley, SharePoint MVP

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Introduction

The truth is, migrations are phased, iterative, error prone, and not your goal.

Migration is a roadblock to moving forward with your SharePoint strategy. Search the web and you'll find plenty of content that seems helpful at first glance, but leaves you wanting.

- ✓ Backup your hardware. Check.
- ✓ Analyze your existing content. Check.
- ✓ Prepare your users. Check.

But what these articles fail to provide is any kind of practical guidance.

MIGRATIONS ARE PHASED. How and what you migrate should not be determined by the technology you use – it's about matching the needs and timing of your content owners and teams. A migration should be flexible, helping you to move sites and content organically based on those end user needs, not the limitations of the technology.

MIGRATIONS ARE ITERATIVE. Your planning should not be limited by the number of migration attempts you make, or by the volume of content being moved. A healthy migration recognizes the need to test the waters, to move sites, content and customizations in waves, allowing users to test and provide feedback.

MIGRATIONS ARE ERROR PRONE. Drag-and-drop SharePoint migration does not exist in the real world. Maybe for plain vanilla sites without any degree of customization, but these sites are few and far between. There is no "easy" button for migration.

MIGRATIONS ARE NOT THE GOAL. Proper planning and change management policies will help you to be successful with your current and future migrations. The goals should be a stable SharePoint environment, relevant metadata, discoverable content, and happy end users.

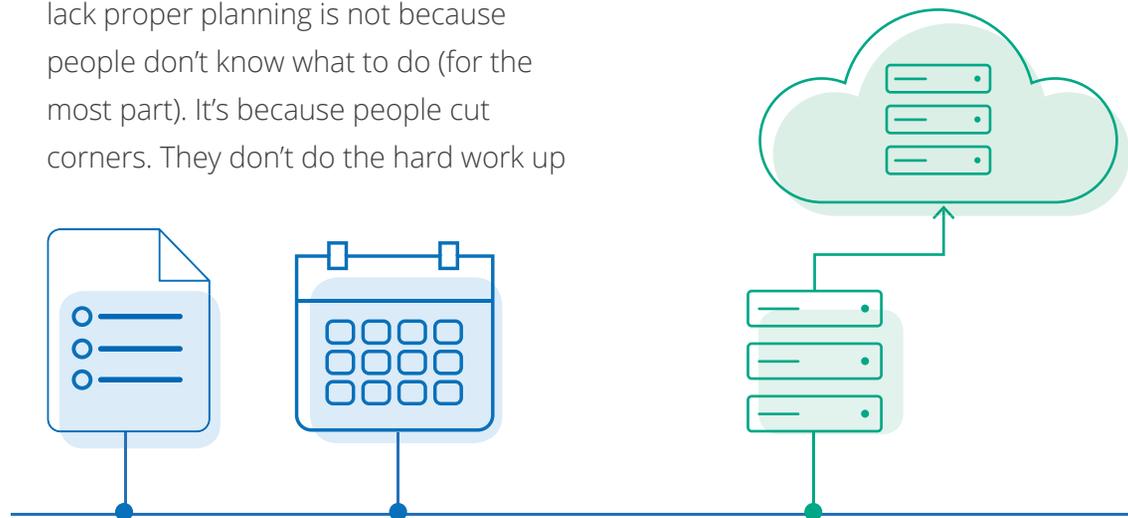
Why you should plan now, migrate later

If we've learned anything in more than a decade of working with SharePoint it is that migration is more than moving bits between servers. When I joined Microsoft back in 2006, my organization was tasked not only with creating a hosted version of the SharePoint platform (now part of Office 365), but we were still responsible for the vast majority of SharePoint deployments internally at the company, and for migrating those systems to the latest version -- at that time from SharePoint Portal Server 2003 to SPS 2007. We made many mistakes, and we came to understand that the real work is in the planning and preparation and architecture around those bits. Get that planning right and not only will your migration go more smoothly, but – and this is the business ROI kicker – you will dramatically reduce the future costs of support and maintenance.

How so, you say? There really aren't any secrets. Plan ahead, and you will mitigate risks. Clean up your content, your information architecture, and your change management processes as part of the migration process (even before you begin to think about migration) and you will have a healthier system going forward.

Of course, there is no easy button. The reason so few SharePoint migrations (and initial deployments, for that matter) lack proper planning is not because people don't know what to do (for the most part). It's because people cut corners. They don't do the hard work up

front. They treat this powerful, complex business platform as they would any other generic server or service within their environment: they install, hand out permissions, and then walk away. That's right: they install SharePoint, add their users, and give planning their minimal attention. It's the "SharePoint Hail Mary" football pass that they hope someone is able to catch way, way down the field and take it in for a touchdown (if I can borrow a US football metaphor).



Which is not to say that you cannot get immediate business benefit from using SharePoint out-of-the-box, foundational planning. People will continue to add their content to whatever mess of content has been migrated from the previous system, they'll configure and customize their sites, and they'll do their best to make it all work. But what happens progressively over time is that Administrators will have trouble scaling SharePoint to meet the growing demands. Support becomes more painful, with end user requests taking longer and longer to fulfil. Maintenance costs (time and money) grow. User adoption is affected, and the overall perception of SharePoint's business value declines.

The other common scenario is that of the reluctant leadership team to fund the up-front planning effort. They may believe that the goal should simply be to get SharePoint up and running quickly,

so that people can be productive. But the shotgun migration method is like buying an 80cc motorbike and trying to merge with traffic on the highway, when what you really need is a 1200cc engine that can keep up with – and surpass – the other vehicles on the road.

From the surface, there is nothing different in your methodology for planning a migration than working with any other enterprise platform, and yet so few implementations seem to follow these best practices. Administrators and end users are hungry for the content, and for best practices. The difficult part is moving from the theoretical to the practical application. Where do you begin? More importantly, if SharePoint is already off-track, how do you get it back on track?

While Metalogix is the recognized leader in SharePoint migrations, we also provide solutions for the detailed pre-migration planning efforts your

organization is going through, we can help ensure that your migration is as quick and effective as possible, and we have the leading solutions on the market for enabling you to automate and optimize SharePoint post-migration:

- ▶ For pre-migration analysis and planning check out our free [Metalogix Expert](#) product.
- ▶ To help with your system clean-up and organization prior to migration, and to help automate administration and governance following your migration, take a look at [ControlPoint](#).
- ▶ And for the fastest and most comprehensive migration solution on the market, check out [Content Matrix](#).

The Metalogix team is invested in helping our customers reduce the risks and improve the success of SharePoint migrations. While there's no easy button, our solutions go a long way in helping you to achieve your business goals.

So what are the areas on which you should focus your planning as you prepare to migrate? While no single strategy will fit every organizational culture, my experience in sharepoint, other collaboration platforms, and 20+ years in project management and business analyst roles can be pared down to five areas of focus:

- ① Understanding the scope up front before you start building / migrating
- ② Establishing and following a defined project methodology so that your activities are predictable and measurable
- ③ Documenting your information architecture and being clear on ownership across the organization
- ④ Moving one workload at a time. Utilizing an iterative and transformative strategy, focusing on key use cases first, expanding over time
- ⑤ Creating a culture of continual improvement, which is your change management process

Understanding the scope of your migration

Scope creep is a familiar term to most of us, yet it continues to permeate our teams and cripple our projects, sometimes unfettered. There is one way to stop scope creep within your SharePoint migration planning — have your project deliverables defined up front, at project launch. Know what it means to complete the project. Have it documented and approved by the project stakeholders and your executive sponsor. Of course, that implies that you know the scope of your project, with the content, information architecture, web parts and solutions, and all other configurations that need to be upgraded, moved, and migrated.

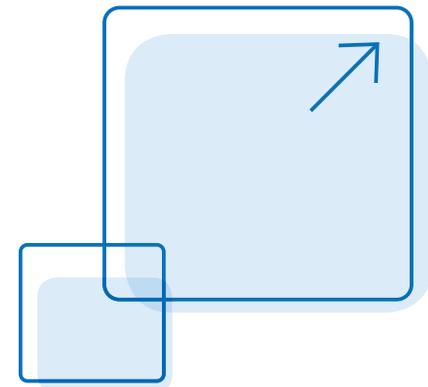
How do you know when your migration has been successful? There are a number of measurements or milestones you can use, depending on the business drivers for your migration. Whether

your migration happens over a single weekend, or as a phased and iterative process spread out across multiple weeks, you will likely migrate teams and systems and sites by business priority, and divide the complex integrations and customizations by level of difficulty and business-criticality.

Having clear success metrics defined up front will help your team (and, more specifically, your management) to see the progress being made. More importantly, having a defined conclusion will keep other new (albeit important) features from slipping into the requirements after-the-fact, bloating the project plan and extending the project indefinitely.

Here's how it typically plays out: initially, your goal is to migrate 500 existing sites and their content to the latest

SharePoint version. Midway through the project, the management team decides they also want to include My Sites (which were to be left to a later phase) and some of the new social media capabilities. Fine. You extend the schedule a week so you have time to work with the end users to capture requirements and modify the plan. The management team grumbles at the delay, but agrees.



A couple weeks later, an executive realizes the plan does not include key integration to the home-built ticketing system built on top of Dynamics CRM, and insists the effort fits within the scope. You attempt to extend the project schedule by 6 weeks for this massive new requirement, but the rest of the management team becomes upset, and there begins to be some infighting. Not your fault, of course, but you get some of the blame anyway. And while the leadership team seems to understand the gravity of what has been piled on the SharePoint team, there is still this belief that the original project timeline — which was communicated to the board — is still what your team has committed to delivering.

Sound familiar? Even the best project managers can get sidelined by office politics if they don't take the steps up front to clearly define and document the scope of the project — and get sign-off.



What is a successful migration?

What are the right measurements?

Possible metrics might include:

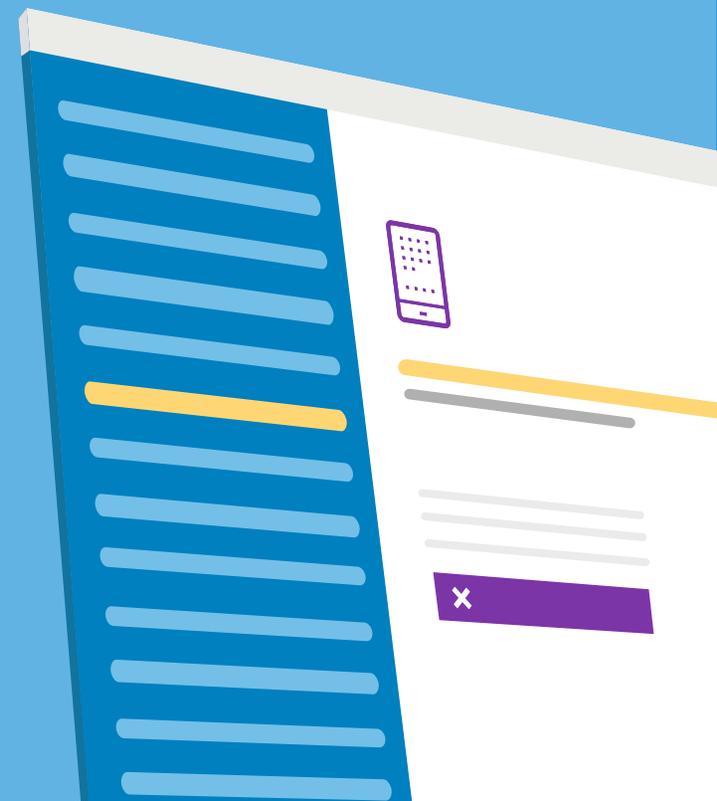
- ▶ The successful migration of a target number of end users to the new platform (100% of users is ideal, yes, but is 85% acceptable? Probably).
- ▶ Or maybe success means that a targeted number of sites have been migrated, with a specified amount of content (maybe 90% of the content databases moved).
- ▶ Another key measurement might be a percentage of file shares migrated, and their hardware decommissioned.

These are all valid metrics. The idea here is to define the scope of your project – and the measurements for success – up front, as part of your bottom-up and top-down sign-off — so that it is clear to everyone (including yourself) when goals have been reached, when commitments have been met, and when your migration can be positioned as successful. Know your migration KPIs, and you'll be able to manage the scope creep when it inevitably rears its ugly head.

If you're looking for help in identifying the scope of your migration, you may want to download our free migration assessment tool, Metalogix Expert, providing you with a quick dashboard view into your sites and content. This free, fast, and powerful tool will help you identify many of the issues that can otherwise cause roadblocks in a successful migration.

Know your migration KPIs, and you'll be able to manage the scope creep when it inevitably rears its ugly head.

**Download Metalogix
Expert Today**

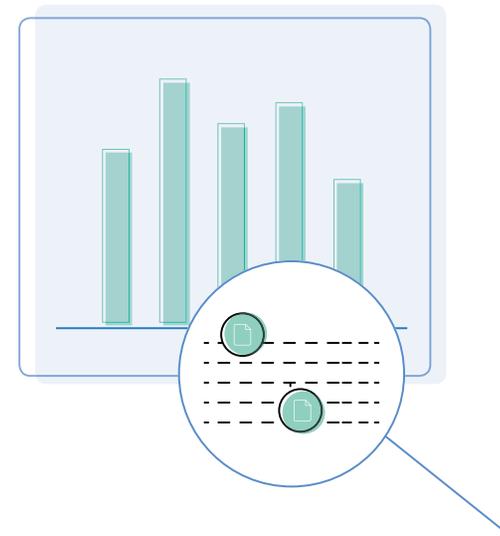


Preparing SharePoint for redesign of your information architecture

As part of this assessment and prioritization process – you should review your SharePoint site metrics. Studying your metrics will help you to understand how SharePoint is actually being used, allowing you to better prioritize which sites and content might need to be migrated / reorganized first, because the teams that use them are very active and rely on SharePoint for their day-to-day business. There are many metrics that need to be reviewed but some often overlooked metrics you need to review and consider include:

- ▶ Permissions by User
- ▶ Usage and Activity Reports
- ▶ Storage Reports
- ▶ Audit Reports

Studying your metrics will help you to understand how SharePoint is actually being used,





PERMISSIONS BY USER, by Active Directory or SharePoint group, or by permission level for your target site/s. So much of SharePoint revolves around permissions, that having a clear picture of who is in the system and what they can do is essential to your future planning.



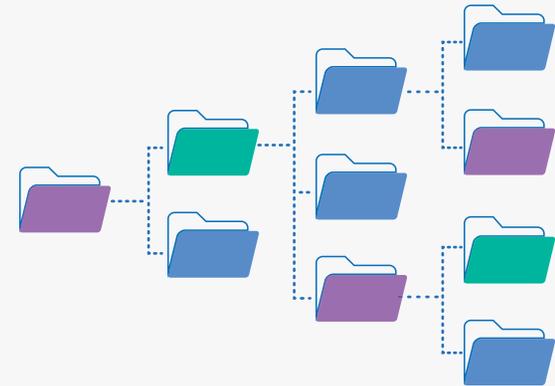
USAGE AND ACTIVITY REPORTS, such as page views, unique users, usage trends, and top sites visited. These are key to understanding who is using SharePoint, and possibly the content and sites which can be archived or deleted due to inactivity.



STORAGE REPORTS are a critical part of planning, with site and trend reporting helping you with your capacity and performance planning efforts.



AUDIT REPORTS provide an even more detailed view into how people are using your environment, and are a way to filter through the SharePoint audit logs to track events by user, date, scope, site, and URL.



With these metrics and reporting, you can more accurately map out the structure of your current environment and understand which sites and site collection are used most heavily, and may therefore deserve a higher priority. As you begin to plan your future environment (whether through migration, or in a brand new deployment), this data will help you identify gaps between the current environment and your new information architecture, giving you a clear picture of the work necessary to cross those gaps. Until you have an accurate picture of where you are today, you will not be able to properly estimate the number of gaps– or size of those gaps – and the effort needed to meet your business goals.

Understand the SharePoint migration schedule

When people think schedule, they generally think project timeline -- a work breakdown structure of the business and technical tasks, culminating in a product or service going live. But with your SharePoint migration planning, it is equally important to understand the business drivers behind the migration, not just the technology drivers.

Are there cost implications for maintaining the current hardware, and is a migration is going to allow you to reduce your footprint and repurpose or reduce hardware? Is the project schedule based on realistic goals, or arbitrary dates set by a manager who wants to please the board of directors by "launching SharePoint 2013 by end of Q1" regardless of the impacts? Do you have the necessary skill sets on your

team to accomplish the work, or service providers (also with the right skill sets) engaged and ready to begin working? All of these issues impact the schedule, but have nothing to do with the technical activity of migration.

There's more to a project schedule than a list of tasks. Understanding the drivers will help you better understand the project priorities, or allow you to negotiate terms with various teams, vendors, and stakeholders when decisions need to be made or risks to be mitigated. To ensure that your project

is on-time and meets stakeholder (i.e. management) expectations, the schedule should be defined only after you:

- ① Understand and document the "future state" of your sharepoint environment
- ② Work with key stake-holders and end users to refine and set priorities
- ③ Get both bottom-up (end user) and top- down (management) buy-in on the plan

While these sound obvious, it is amazing how many projects get off the ground without following even the simplest of project management best practices.

Include a lock down period when no servers should be added or moved. Having a baseline for your testing is just common sense. Don't make it any more complicated than it already is.

That's my high-level planning advice, but what about some specific advice? What are some common pitfalls in migration planning? Where do people go wrong? Well, here are some additional — and much more granular — activities that you should definitely include in your plans:

- ▶ Allocate time to backup your systems before attempting any migration. Most migrations follow Murphy's Law— anything that can go wrong will go wrong (if you don't have a backup).
- ▶ Create a communication plan for your end users and partners to regularly help them understand what is next on the plan and what has been completed, including what is being migrated, and (hopefully) how long it will take to complete the migration. People will tolerate schedule slippage if they know what is happening. Keep people in the know.
- ▶ Make time for ample testing. The tendency is to chip away at testing as other aspects of the schedule tighten. Don't do it. This is your last stand to find issues before releasing the new system to the end users. Use testing time for testing.

The top 5 SharePoint migration pitfalls and how to avoid them

If you've seen me present, you know that I love lists of practical information – and content that is actionable. One of the lists I'll be presenting this week contains some of the most common SharePoint migration pitfalls and how to avoid them:

① RUSHING THE PROCESS.

In the movie *Spaceballs* (I love to quote classic American films), the antagonist's spaceship overshoots their target by miscalculating their jump into hyperspace by fractions of a percentage, landing them in the wrong galaxy (and with a plaid vapor trail). The point here is that small mistakes in rushed planning cycles can lead to huge gaps further down the road, which can be expensive to overcome. In SharePoint for example, data model and taxonomy flaws may not show up for months down the road – and it is harder and more expensive to correct the problems later.

② NOT IDENTIFYING ALL OF YOUR CUSTOMIZATIONS.

If you've performed previous SharePoint migrations, then you have likely run into the pain of digging through error logs to find out why a migration failed – only to come across a rogue web part or custom site design. As Murphy's Law dictates, these failures always happen at the most inconvenient time: over a weekend, during crunch time. In addition, they usually cause the maximum amount of duress to you, your management team, and your end users.

Your migration is an opportunity for your organization to clean up, transform, and realize your SharePoint vision. It is not just a technical activity, but should be a much more thoughtful and planned process.

③ TREATING ALL SITES AND END USERS THE SAME

Three out of four teams may use SharePoint out-of-the-box, but treating that fourth team – with their custom workflows, extensive dashboards, and customized integration to the CRM system – the same way as the other would be disastrous. Why? The OOTB sites should, in theory, migrate cleanly, but the fourth site will need care and hand-holding. Treating them the same could break the site, leaving the team that actually uses SharePoint in turmoil. Understand the individual needs and requirements of each team, especially your power users – the folks who depend on SharePoint day in and day out.

④ NOT TESTING.

Migrations are iterative. This is because different teams, sites, and site collections have different priorities and requirements. You need time to validate what has been moved both from a technical standpoint, and from an end- user standpoint. A robust migration strategy allows for verification that permissions, navigation, look and feel, and content are all working as planned.

⑤ GOING IN WITHOUT A ROLLBACK PLAN.

A good project manager has a plan for and mitigates all risks with a solid rollback plan. Why should a SharePoint migration be any different? You may be able to recover from problems caused by rushing into the process, not identifying all of the customizations in your environment, treating all of your sites the same, and not employing healthy test practices – but you will not recover (without severe pain) from roll back failure (one of the reasons why in- place upgrade is rarely recommended). So plan accordingly. Have your backups ready, otherwise Mr. Murphy and his Law will likely join you on this little endeavour.

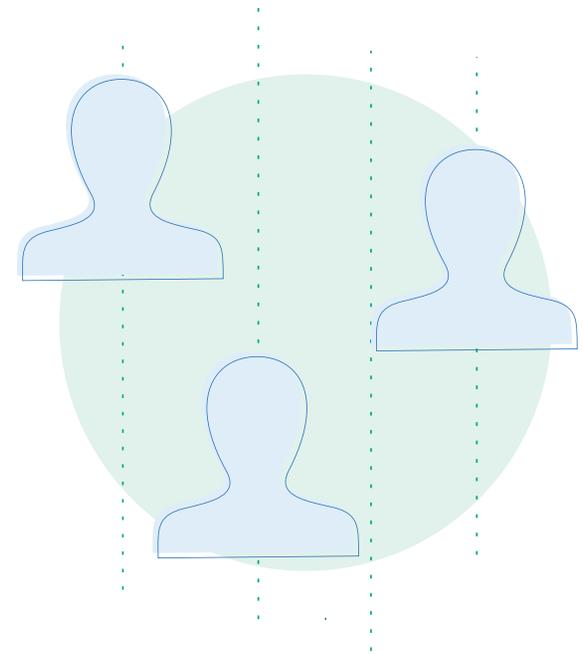
Don't forget your end users in your migration planning

SharePoint migrations are much like an iceberg: what you see on the surface is the technical aspect of the effort -- the moving of bits between hardware. But under the surface is where the real work begins -- the massive planning effort that really determines how and when your technical migration will take place, and whether the resulting SharePoint environment will, ultimately, be successful.

Since my first hands-on experience with SharePoint migrations almost 10 years ago, helping organizations move from SPS 2003 to MOSS 2007, one of the best practices I have always employed is to reach out to end users early to involve them in the planning process. Because the platform is used (and depended

upon) by end users, it's important to keep them in the loop on what you're planning, get their help on prioritizing and classifying content, and inform them of changes as the plan is being executed. Including them in the migration planning is a key to long-term adoption, because the more you involve people in the process -- the more likely they will support the outcome. That's a lesson I learned through trial and error.

With most migrations, content is reorganized and new features are introduced. Don't assume that everyone knows how to use these new features. Many of us learn by doing, and can become quite proficient without any formal training, but some degree of formal training can expedite the learning



curve from end user to power user, and help your business get the most out of its investment.

You must decide where and when to involve your end users before you begin. This is the most fluid of your strategic considerations as you balance the risks, requirements, and realities of your migration.

Another consideration when planning for end user involvement is to understand the culture of your organization. For enterprise-wide projects, how do you normally involve end users? Do they help drive the process, are they brought in as part of a clearly defined process or IT methodology, or is it completely ad hoc based on role or individual? Some of the areas where end users should be involved include the creation of use cases, creation of your as-is or current state documentation, prioritization of requirements for to-be environment, and the identification and reorganization of metadata and content. Your users know their content – so let them drive activities around file share migrations, taxonomy development, metadata assignment, and sign-off of the overall project plan.

No matter how you involve them, have a plan, reach out for feedback, and be flexible as you shape your future environment.

Another consideration when planning for end user involvement is to understand the culture of your organization.

How you include your end users really just depends on:

- ▶ Who your users are (are they power users, or do they only consume content from pre-defined sites?),
- ▶ What the current environment looks like (not just look and feel, but how is it being used? Is it out-of-the-box or do you use it for more complex business processes?), and
- ▶ The overall goals of your migration (just move the content as-is, versus a complete transformation of content, taxonomy, and design?).

The Definitive Guide to better SharePoint migration planning.

Let's face it, whether you are moving from a previous version of SharePoint to a later version of the product or moving to SharePoint Online as part of Microsoft's Office 365 offering, organizations are faced with exactly the same problems, irrespective of the industry vertical that they occupy space in.

As Metalogix has helped thousands of companies, be it consulting services firms, customers using SharePoint or System Integrators, we've collected learnings along the way. What we have found can be summed up as the "Top 6 concerns when migrating to a later version of SharePoint":





PLATFORM DIFFERENCES

If customers are still working with 2007/2010 moving to SharePoint 2013/2016/2019 is vastly different. Not only has the User Interface changed, there are more service applications, considerable architectural changes to the underlying platform and the application service has been reworked. So much more planning must happen upfront in order to facilitate the changes needed to migrate to the latter platforms. Added to that, the integration into Office Online Server and the new Business Intelligence features available should be taken into consideration, including the additional infrastructure required.



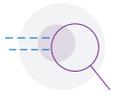
CONTENT

Companies and consultants need to make sure that they conduct a proper inventory assessment when looking at moving content from one platform to another. All too often, content is moved as is across to the new platform. Companies' need to ensure that they have a concise Information Lifecycle Management policy in place so that stagnant content (read "dirty") is not moved across as this greatly impacts the findability essence of the platform. This also attributes to proper Information Architecture practices. Get rid of unused sites, archive content that needs to remain for legislative purposes and de-dupe before moving content across.



USER EXPERIENCE

With the advent of mobile and the vast amount of screen sizes now available, Microsoft has invested heavily in ensuring that SharePoint can be consumed across not only multiple screen sizes but also multiple platforms and browsers. They achieved this by porting the platform across to support HTML 5 and CSS 3 standards. And with the updated UI, SharePoint 2007/2010 versions cannot be moved seamlessly across without some refactoring the design. It is paramount for organizations to take heed to what is available upfront so that they understand what needs to be changed before migrating to a newer platform.



CUSTOMIZATIONS

Arguably the largest and most complex of all tasks, working through what customizations have been built in your current environment. Yes, SharePoint on-prem still supports WSP's but it is essential to understand what changes have been made in subsequent versions of SharePoint. Since SharePoint relies on the .NET framework certain deprecations have occurred from a development perspective when moving to later versions. SharePoint 2010 uses .NET 3.5 whereas SharePoint 2013 uses .NET 4.5. Added to that, SharePoint 2013 and later supports new App Development models including hosting the app in Azure.



CLOUD

Forget everything you know. There are no service applications, there are no WSP's or Sandboxed Solutions, there is no SQL, the App Model is different, there's new "modern" site collection templates that impact the design; the list of changes are endless. And of course, there is Hybrid. Before moving your entire farm to the cloud, consider starting with hybrid. Move your content across while both platform co-exist. This gives you more time to understand what is in the cloud so that you can better plan, while still embracing the new features available in Office 365.



TRAINING AND CHANGE MANAGEMENT

There is no silver bullet. Your users need to be educated and the move, how much time it's going to take, the effort required for the transition and also the new way of working. This can only be achieved with a concise plan. There really is no point in putting all your efforts into the IT side of the migration and no effort in the end user side. Afterall, they are the ones working with the platform. They need to know that its going to take time, that there might be some disruptions but ultimately, you want to give them a better experience when working with SharePoint.

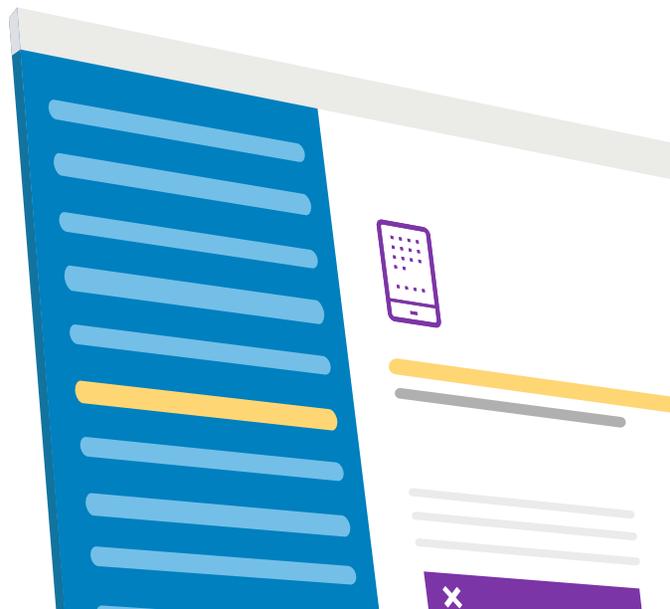
These are by no means an exhaustive list of items to work through, instead, they should be seen as guidelines when starting to plan out your migration. Lastly, make sure to test, retest and test again to make sure that what you are planning, works!

Need help?

Metalogix can help you throughout every stage of your migration project.

From pre-migration analysis to post-migration governance, we provide industry-leading solutions that are designed to cover all of your migration, management, and security needs.

If you're in need of a hand, we'll help develop a comprehensive strategy and set up a migration that works for you—no matter how complex your collaboration environment is.



Metalogix Expert

Metalogix Expert is a free migration tool to get you started.

It gives you insight into every part of your SharePoint and Office 365 strategy so you can optimize your content migration, storage strategy, and more.

Check out Metalogix Expert to kickoff your migration project today.

[Learn More](#)

Additional resources

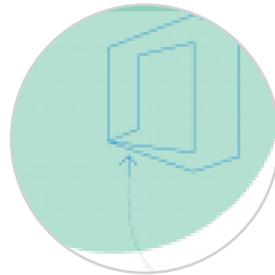
eBooks



How to Prevent a
SharePoint Migration
Disaster

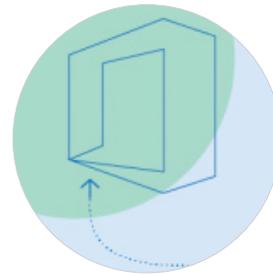


How to Successfully
Implement OneDrive
for Business



The Best Practices
of Office 365 User
Management

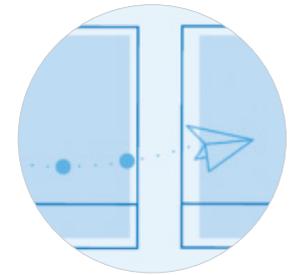
Webinars



Get Value from Your
Move to Office 365:
Don't Forget Your
Users



You've Planned Your
Migration, Now What?



Migration Planning:
What are You Missing?

About Metalogix

Metalogix's award-winning cloud, hybrid, and on-premises solutions provide organizations with the freedom and control to migrate, manage, and protect content within enterprise collaboration platforms. Over 20,000 clients trust Metalogix to optimize the availability, performance, and security of their content across the collaboration lifecycle.



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