Beyond Migration:
How To Transform Your SharePoint Environment

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INTRODUCTION

For many organizations, migration can be a roadblock to moving forward with your SharePoint strategy. Whether upgrading from an outdated SharePoint 2007 system to the latest version of SharePoint on premises, moving content from file shares or from another ECM platform over to SharePoint, or consolidating your various SharePoint versions and geographically-dispersed farms to a single cloud-based solution, migrations are complex activities.

Search the web and you’ll find plenty of official content that seems helpful at first glance, but most of it focuses on the technical aspects of the effort. Search the web and you’ll find plenty of official content that seems helpful at first glance, but most of it focuses on the technical aspects of the effort. Backup your hardware. Check. Run the out-of-the-box analyser scripts. Check. Prepare your users. Check.

What many of these articles fail to provide is any kind of practical, real-world guidance. We know the technical limitations of the platform, and that not every solution or customization we’ve built out on our old systems can be moved (at least not in one clean shot) to our new systems -- but how are others managing their migrations?

What are they doing with their InfoPath forms? Their complex workflows? Those remnant Fab40 templates? The truth is, migrations are phased, iterative, and error prone activities -- but they are also not your end goal:

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, allowing you to refine your strategy and reload, as necessary.
Ultimately, a migration is a subcomponent of a broader change management strategy -- an ongoing effort to provide oversight and governance to the movement of content assets between systems. The average SharePoint customer maintains two or more SharePoint versions within their production environments. On top of that, the average farm size is just over a terabyte, each growing by 50 to 75% per year. The key to successfully managing your systems is to establish sound change management practices, with the right tools and expertise to help you with the heavy lifting.

As you think about your short-term migration or consolidation plans, also think about how these activities fit into your broader change management framework, and whether you have the right tools in place to manage and automate those activities.

**MIGRATIONS ARE ERROR PRONE.** Drag-and-drop SharePoint migrations do 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, no matter how pretty the interface of the tool you’re using.

**MIGRATIONS ARE NOT THE GOAL**, but proper planning and change management policies will help you to be successful with your current and future migrations. The ultimate goal of your move should be to deliver a stable environment to your end users, comprised of relevant metadata, discoverable content, and solutions that are closely aligned with your business needs.
Over the past few years, I’ve written dozens of articles on the topic of SharePoint migrations. As SharePoint has become more complex, and as companies move from using it for basic document storage and team-based solutions to using it as a strategic collaboration platform, the activity of moving from one version to another has also become complex. Whereas an “upgrade” is more of an automated activity enabled through SharePoint itself, supporting the move from one version to its replacement (but not a double-hop, which is to say not from 2003 or 2007 versions straight to 2013). However, what most customers come to find out is that their environments rarely fit the profile of a simple upgrade and instead need to do quite a bit of content and information architecture cleanup, site and site collection redesign, navigation repair, and sometimes a complete re-thinking of how SharePoint is deployed. For these situations, Microsoft recommends third-party migration solutions, such as Content Matrix from Metalogix.

Even with tools in place -- and regardless of whether your intended destination is another on premises installation or a move into the cloud, migration is largely a people-centered activity, requiring planning and prioritization around the hardware, the software, the content, the architecture, and the governance and administration activities around everything. Migrations are an iterative process that benefits greatly from systems-based planning activities, with most successful migrations following a phased approach that allows teams to test out new features or updated customizations -- as part of your user acceptance testing. Some tools, such as Content Matrix, can help you manage your environment beyond your move to the latest SharePoint version -- providing ongoing change management support as your data grows, as your company requirements change, and as the platform matures.
I’m often asked to share best practices for SharePoint migrations, and given my background in business analysis and project management, my advice is always along those lines:

**PRIORITIZE YOUR SITES, SITE COLLECTIONS, AND THE TEAMS THAT OWN THEM**

One common mistake is to treat every SharePoint site or site collection the same. Having strong analytics about who is using your platform, and how much they use it, can become essential when trying to build out your migration plan. As in any complex project, you cannot do everything at once. You need to prioritize. Within SharePoint, consider which sites and teams need to move first. As with providing ample test time, developing a plan around these priorities will have an impact on end-user adoption. Focus first on those teams who use SharePoint day-in and day-out. Identify your “power users” who drive much of the activity within those sites, and work closely with them to understand the content, information architecture, web parts, and other configurations that are “must haves” for the new environment, and then to have them provide your user acceptance testing (UAT). Every team will want to part of that first wave of deployments and testing, but by prioritizing who moves first and working closely with those teams on planning, UAT, and governance strategy, you can focus on those areas of the business that will drive the most value by moving to the new SharePoint version first. And by working closely with the power users on those teams, your subsequent migrations will go much more smoothly as you learn more about the nuances of your environment.

**BUILD A TEST PLAN**

One of the biggest mistakes you can make is to trim your schedule by removing testing. SharePoint is a strategic platform for many organizations, and while many aspects may be turn-key and intuitive from an end-user’s perspective, moving from one version to the next can cause data connection issues, inconsistent behaviors around web parts and apps, and differences in look and feel -- as it would for any enterprise application in
its category. Remember that SharePoint is a business platform, and your business users need time to review, provide feedback, and sign off on whether your migration was a success. Getting their buy-in is the key to overall adoption.

PILOT YOUR MIGRATIONS, THEN EXPAND ON SUCCESSES
It is never advised to build your migration plan around an “all-or-nothing” strategy. Many migrations fail (at least in part) due to unidentified customizations or poorly architected solutions, and so it is highly recommended that your test plan include several smaller pilots to “test the water” on new functionality, new branding, and certainly on new third-party extensions of SharePoint’s native capability. With each pilot, know how to roll back your migration, and be ready for problems should they occur. This is why so many experts recommend breaking your migration into logical phases, going piece by piece rather than all at once. With this pilot and phased approach, rollbacks are less painful should problems arise.

KNOW YOUR CHANGE MANAGEMENT MODEL, AND COMMUNICATE
Change management is not just part of your SharePoint migration strategy, but it should be at the center of your ongoing support model. SharePoint is used (and depended upon) by all aspects of the business, so be sure to have a solid communication process and change management model in place that gives end users a place to provide feedback, and process for prioritizing their requests, visibility into the state of those requests, and metrics/reporting on execution. The more transparent you make the process, the more likely your end users will participate (and trust) in the end result. Tell them what you will be doing, share information with them as the migration is underway, and give them a summary of the plan once completed. Including them in the migration planning is another key to long-term adoption, because people tend to throw their support behind the things that they are directly involved in -- it's just human nature.
DON'T UNDERESTIMATE YOUR TRAINING NEEDS
Migrations tend to shuffle content and site architecture and navigation and dozens of other things that can make adoption difficult. Don’t assume that everyone knows how to use the new features in SharePoint -- even those end users who have been working with SharePoint for years. They may come up to speed more quickly than others, but training is still necessary.

USE MIGRATION TO TRANSFORM YOUR ENVIRONMENT
Migration is an opportunity to help you realize SharePoint’s potential -- and to build out a platform that better aligns with your business. It is often referred to as ‘transformation’ because it is a process of reorganizing, re-architecting, and improving upon your vision for SharePoint. Deleting empty sites, consolidating site templates and content types, redesigning navigation, removing customizations that can be replaced by out-of-the-box capability, and outlining keyword taxonomies will help your end users take advantage of the rich features in the platform, including improved Search and the new social capabilities.

No two SharePoint migrations are alike, and there is no such thing as a point-and-click migration. Not every ‘best practice’ applies equally to every deployment, or to every company. Your organization has strengths and weaknesses, and not every one of these suggestions may apply -- but there is a lot you can learn from the community. My recommendation is to make your migration process as transparent as possible inside your company, leveraging the experiences of your entire team -- and use their constant feedback as a sounding board on what works, what needs refinement within your planning. Take the time to properly plan your SharePoint migration, and your results will be well worth the investment.
9 STEPS OF A SUCCESSFUL SHAREPOINT SITE TRANSFORMATION

Your SharePoint migration is not just a technical activity – it can be a metamorphosis. More and more companies are beginning to understand this as they read case studies and talk to other organizations who have recently migrated, or as they reflect on lessons from their own previous migrations. For many companies looking to move to SharePoint 2013, they have actually slowed their upgrade plans in order to spend more time planning, taking advantage of this move as an opportunity to rebuild, redesign, and to transform their environments to better align with their business goals and to utilize SharePoint’s full potential.

But where should companies start? On which areas should they focus their planning? At a recent event, I was able to interact with a number of clients who were in the midst of their migration planning, and was able to capture some of their “best practices” and add them to my own guidance for those about to make the move. While not an all-inclusive list of things to include in your planning, you may find some of these ideas helpful:

1. SIMPLIFY YOUR ENVIRONMENT.

Many organizations maintain more than one SharePoint farm – and usually more than one version of SharePoint. Use migration as a path toward consolidation – wherever possible – allowing you to decommission and repurpose hardware, possibly moving part or all of your content to the cloud, and simplify your life. Reducing the number of farms you maintain may not be an option (based on the enterprise features you employ, restrictions with moving into the cloud, and/or the size of your end user population), but migrating from earlier versions of SharePoint to one version will at least lessen the administrative (and licensing) headaches.
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As you review your existing environment, this should be one of the first steps – especially if you plan to deploy the Managed Metadata Service or simply have a goal of centrally administrating your taxonomy. A clear map of your content types, the sites that consume them, and the teams/admins who own them will help propagate your MMS plan.

One of the major shifts that happened with SP2010 was the move from folders to metadata -- which has been expanded in SP2013 and the tighter integrations with FAST search. While metadata and taxonomy should drive much of your architecture, there may be organizational and business process reasons for retaining folders. Flatten what you can, but understand the requirements for keeping folders in place and how they may impact the search experience for your end users.

BEYOND MIGRATION: HOW TO TRANSFORM YOUR SHAREPOINT ENVIRONMENT

2 STANDARDIZE YOUR SITE STRUCTURE AND TEMPLATES.

3 CONSOLIDATE YOUR CONTENT TYPES.

4 CLEAN UP YOUR FOLDER STRUCTURES.
TIGHTEN UP YOUR PERMISSIONS.

Hopefully your migration is not the first audit of your permissions health, but either way – take this opportunity to do some deep analysis on users and administrators within your system and clean house. Some suggestions: make sure the right people have access to the right content, delete users who are no longer in Active Directory, and give people access through groups rather than direct access.

REFINE YOUR KEYWORD TAXONOMY.

As with content types and folders, it is important to outline your top-level taxonomy, and work with your teams and business units to delve into the site, and site collection-specific keywords. Just understand that this is an iterative process which will continue on past your current deployment, requiring ongoing management as part of your regular governance operations.

BUILD A CONSISTENT NAVIGATION.

Migration is a great opportunity to clean up, simplify, and unify your navigation so that it makes sense to your end users, helping them find the right content – in a logical site structure.

LEVERAGE NEW FUNCTIONALITY.

SharePoint 2013, whether on premises or online, offers many new features that may not have factored into your previous strategies. Understand what is available in the platform, and – equally important – what custom aspects of your older environment can now be displaced by out-of-the-box capability.

IMPROVE (OR BEGIN) GOVERNANCE

One of the best practices that you will hear shouted from every SharePoint evangelist is the importance of governance. SharePoint is not a shrink-wrapped product. It takes thoughtful deployment, personalized configuration, and ongoing governance to ensure your organization gets the most out of their investment. If you do not already have a governance body in place, think about starting the process now, including key stakeholders, admins, and end users.
As you prepare your SharePoint environment for migration, it’s always best to begin with a plan in mind, and iterate with your team on how to move forward. At Metalogix, we provide multiple toolsets that can help your organization clean up, organize, and orchestrate your migrations — and establish administrative and governance best practices post-migration.

Our **CONTROLPOINT** tool provides a powerful set of capabilities to help you clean up before, and govern after your migration. **CONTENT MATRIX** allows you to organize and schedule your migrations to minimize risks and downtime. And **STORAGEPOINT** is a fantastic tool to optimize your storage management policies in your new environment. Of course, Metalogix offers a number of other tools for Exchange, SharePoint, and Office365, so please take a moment to review our website.

These are just some of the basic steps to transforming your legacy SharePoint environments as you prepare to migrate to the latest SharePoint version. Obviously, there is much more to do. But hopefully this gives you a place to start down your planning and migration path.
MOVING SHAREPOINT FROM IT-LED TO BUSINESS-FOCUSED

SharePoint is fundamentally a business platform, worth more than the sum of its parts. It is not just a piece of software, not just a series of servers, not just a collection of tools and accelerators: it is a platform on which your business can associate, collaborate, and innovate. So why are the majority of deployments initiated by IT or engineering without the voice of the business users?

If this sounds like your company, and you’re preparing to build out SharePoint (or planning a migration from an earlier version), these are steps you can take to move this project from a purely IT-led initiative to a more business-focused effort:

1. BUILD YOUR ENVIRONMENT WITH BUSINESS SOLUTIONS IN MIND.
   Never deploy SharePoint without a clear idea of the business solutions you are trying to solve. While “to collaborate more” or “to create a single version of the truth” are technically valid, these generic answers can be applied to a wide range of solutions, and don't help you refine your plans to meet the specifics of your business. Something more detailed might be “Automate dashboard capabilities for each business unit, pulling real-time data from transactional systems and direct user input.” Having a clear picture will help you better estimate your project goals.

2. INCLUDE YOUR END USERS IN THE PROCESS.
   Your end users know their content and business systems better than you, so why would you not include them? Get them involved early and often, have them participate in the testing, and give them visibility into the project requirements and planning. The more involved they are, the more likely they will adopt the resulting platform.

3. MAP OUT YOUR INFORMATION INFRASTRUCTURE.
   Nothing is more important to SharePoint than a solid information infrastructure. Your metadata and taxonomy will make your platform usable, searchable, and functional. Map out your site structure, navigation, and all of your custom content types and site templates. Having a clear map will also help you to understand your future governance needs, and where you will need resources to manage SharePoint going forward.
4. CONDUCT THOROUGH CAPACITY PLANNING. You can’t truly conduct your capacity planning until you complete the previous steps, as they can dramatically change your perception of what the system looks like. Assuming you have solid requirements, end user input, and a plan around information architecture, you can then estimate site, list, and content database throttles, and your future growth needs.

5. BUILD OUT A BALANCED SCHEDULE. Be sure to include time for planning, testing, and post-deployment review (lovingly known as the post-mortem). This will help you to keep the project business-focused, and provide for continuous feedback from stakeholders and end users – which will help with the overall success of the deployment. Overall, it’s best to deploy in steps, dividing and conquering, and building on successes.

6. TRAIN PEOPLE ON THE NEW PLATFORM. Don’t assume that people understand even the basics of SharePoint. Even if the effort is an upgrade, provide training and tools so that there are no barriers to adoption. If you’ve built your platform around specific business solutions, you’ll want to train people on the new ways in which they’ll accomplish their jobs.
THE VALUE OF A SHAREPOINT TRAINING PLAN

It’s not uncommon to get excited about discovering a new productivity tool that will help the enterprise perform more efficiently. It is a good thing to bring tools to people to assist them in their job. When I deployed SharePoint for the first time while working with a customer to help them better connect their employees across multiple locations, it was fun to watch the rapid adoption -- and the innovation and teaming that happened as a result. The thing to keep in mind is that any introduction of something new brings change – multifaceted change. Some of these changes include:

**ORGANIZATIONAL CHANGE** -- Processes, policies and procedures will most likely be affected by introduction of a new tool. These adjustments should be analyzed and planned for in the implementation.

**INFRASTRUCTURE CHANGE** -- New hardware, software and/or services will most likely be required. This affects budgets, and needs to be accounted for to ensure all pieces are factored in to make sure nothing is missed – especially in a phased approach to deployment. We don’t want to add ‘surprise’ to ‘change’ if it’s not necessary!

**BUSINESS STRATEGY** -- How will this new tool affect the overall strategy and goals of the business? Nothing should be introduced into an ecosystem that does not strive toward a planned goal or objective for the business. This is where organizations can easily hemorrhage in budget, profit and efficiency.
Teams can also view these tools as ‘just another thing to learn’ with no true value. And an often missed perspective for this change is human capital. How are the masses accounted for in this change? Miss this mark and despite the best of intentions, a deployment can become a grand failure.

In most technology deployments, launch of a new tool or productivity solution often originates within the IT department -- but this is changing very quickly, as business users are growing more confident in their ability to find and acquire new technologies. Regardless of where the solution originates, when planning starts, it is energetic. Excitement abounds with getting new gear and new software, and setting up new infrastructure and processes. The main focus, especially in the beginning, is how to best fit this new tool and its requirements into the existing business processes and how to maintain the new tool. Much time is spent on evaluating different options and review and analysis of the best fit.

Training seems to remain in the forefront of focus at this point. IT staff that are in charge of maintaining the tool are often sent to training, especially if there is hardware or software being added. Admins of the new tool may receive robust training as well. It is not uncommon that these folks are sent to weeklong trainings.

Now we have IT staff enthusiastic about digging into this new tool. Riding on this enthusiasm, a testing environment is set up. Enthusiasm grows as IT staff has a place to test and stretch the tool, try out new things and analyze its capabilities within the organization’s environment. This phase is often done in organizational silence as the masses are not aware of the testing going on.

Now that the tires have been kicked so to speak, it’s time to share this experience with a pilot phase. This usually means that a small group will be the guinea pigs. This is the group that will use the tool in their workload to demonstrate day to day use. Here is also where the implementation tends to hit the skids.

As this pilot team begins using the tool, as they foresee they will use it in their normal workflow, issues arise. Barriers and gaps are identified. IT staff goes from a more playful interaction with the tool to more fixing how it performs.
Interaction with the tool becomes more work than fun. The pilot team usually begins to express some frustration at limitations they are experiencing and patience begins to dwindle.

Even though this is just a pilot and is meant to identify shortcomings of the initial configuration, this process of criticisms, fixing, tweaking, feedback, more fixing, etc. can become tiring. Now in the timeline of the deployment, the teams involved are now road-weary. Enthusiasm can wane, especially of the pilot does not conclude on a positive note.

This point represents a large point of failure. It is here that a major implementation blunder can easily occur. Enthusiasm has waned. And all too often, rather than reevaluating the deployment to take into account the results of the test and pilot phase, the tool gets rolled out anyway. Timelines may have slipped creating a rush to get the tool rolled out. Budget may also have been burned through by this time. This is usually most evident in lack of training for the end users.

Now let's think about this for a second. The organization has evaluated a productivity tool that should build efficiencies into teams. This tool is meant for the masses, yet this is the one demographic group that most often gets left out of thorough training. We have IT staff trained, a few pilot staff somewhat trained, and now the remainder of the organization is left to their own devices. This is a huge invite for end users to avoid using the tool entirely, or developing enough hacks to get by, yet clinging to the same processes the tool was meant to streamline.

It is imperative to plan for thorough training for all demographics using the tool. This will help to ensure user adoption. Now while this is not the only factor in user adoption, and there is never a guarantee of adoption, training will build a strong foundation of confidence for end users to utilize the tool as intended. If done right, the end users can also be allies in discovering additional efficiencies through the tool helping the organization to increase its ROI.
All levels and stages of training throughout the deployment lifecycle should be accounted for via a well-defined and realistic training plan. This documentation should include every layer of training from initial training of IT staff through end user training. This plan should help guide the implementation and keep the end user in mind. It follows the best practice of “keeping the end in mind” when performing a deployment.

Of course there are other factors affecting user adoption, such as making sure process and procedure revisions have kept up with the deployment, that an effective communication plan is being followed and is embedding excitement to the end user all along the way showing them the value of this tool to their everyday efforts, and adequate support has been established to help teams with the inevitable learning curve. But by establishing and executing a strong training plan for all involved this will go a long way in alleviating frustrations, building confidence and paving the way for success.
ABOUT METALOGIX

Metalogix provides industry-recognized management tools for mission-critical collaboration platforms. These tools are engineered and supported by experts committed to the rapidly evolving deployment and operational success of our clients.

Metalogix’ world-class tools and client service have proven to be the most effective way to manage increasingly complex, and exponentially growing metadata and content across collaboration platforms.

For over a decade, Metalogix has developed the industry's best and most trusted management tools for SharePoint, Exchange, and Office 365, backed by our globally acknowledged live 24x7 support. Over 14,000 clients rely on Metalogix Tools every minute of every day to monitor, migrate, store, synchronize, archive, secure, and backup their collaboration platforms. Metalogix is a Microsoft Gold Partner, an EMC Select Partner, and a GSA provider. Our Client Service division of certified specialists is the winner of the prestigious NorthFace ScoreBoard Award for World Class Excellence in Customer Service.
ACCESS THE METALOGIX MIGRATION TOOLKIT

Metalogix is dedicated to your SharePoint migration success. Below is a link to our free Migration Toolkit, which contains over a dozen free checklists, tools, and Microsoft MVP advice for every stage of a SharePoint upgrade or migration. The SharePoint Migration Toolkit brings the collective experience of thousands of migrations to your project.

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