

# THE DEFINITIVE GUIDE TO SHAREPOINT MIGRATION PLANNING

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# Introduction

If I've learned anything in more than a decade of working with SharePoint, it's that migration is more than moving bits between servers. When I joined Microsoft back in 2006, my organization was tasked with creating a hosted version of the SharePoint platform (now part of Office 365), but we were also responsible for the vast majority of SharePoint deployments internally at the company, including migrations. We came to understand that the most important part of any migration is the preparation — clean up your content, information architecture and change management processes before you begin to migrate anything, and not only will your migration go more smoothly, but you will have a healthier system going forward, which will dramatically reduce both risk and support and maintenance costs.

The most important part of any migration is the prep work. Here's how to do it right.





Unfortunately, too many organizations fail to make planning a priority during their SharePoint migrations. Instead, they treat this powerful, complex business platform as they would any other generic server or service in their environment: They install it, hand out permissions and walk away. Sometimes IT has little choice because the leadership team is reluctant to fund the up-front planning effort, seeing it as an unnecessary delay on the road to getting SharePoint up and running so people can be productive.

The problems with taking this approach might not be obvious immediately. People will add their content to whatever mess of content has been migrated from the previous system and configure and customize their sites, doing their best to make it all work. But over time, administrators will have trouble scaling SharePoint to meet the growing demands. User requests will take longer and longer to fulfill, and maintenance costs will grow. User dissatisfaction will grow and platform adoption will suffer as the perception of SharePoint's business value declines.

How can you avoid this outcome? By developing a thorough SharePoint migration project plan that keeps your goal firmly in mind: a stable SharePoint environment with discoverable content, relevant metadata,

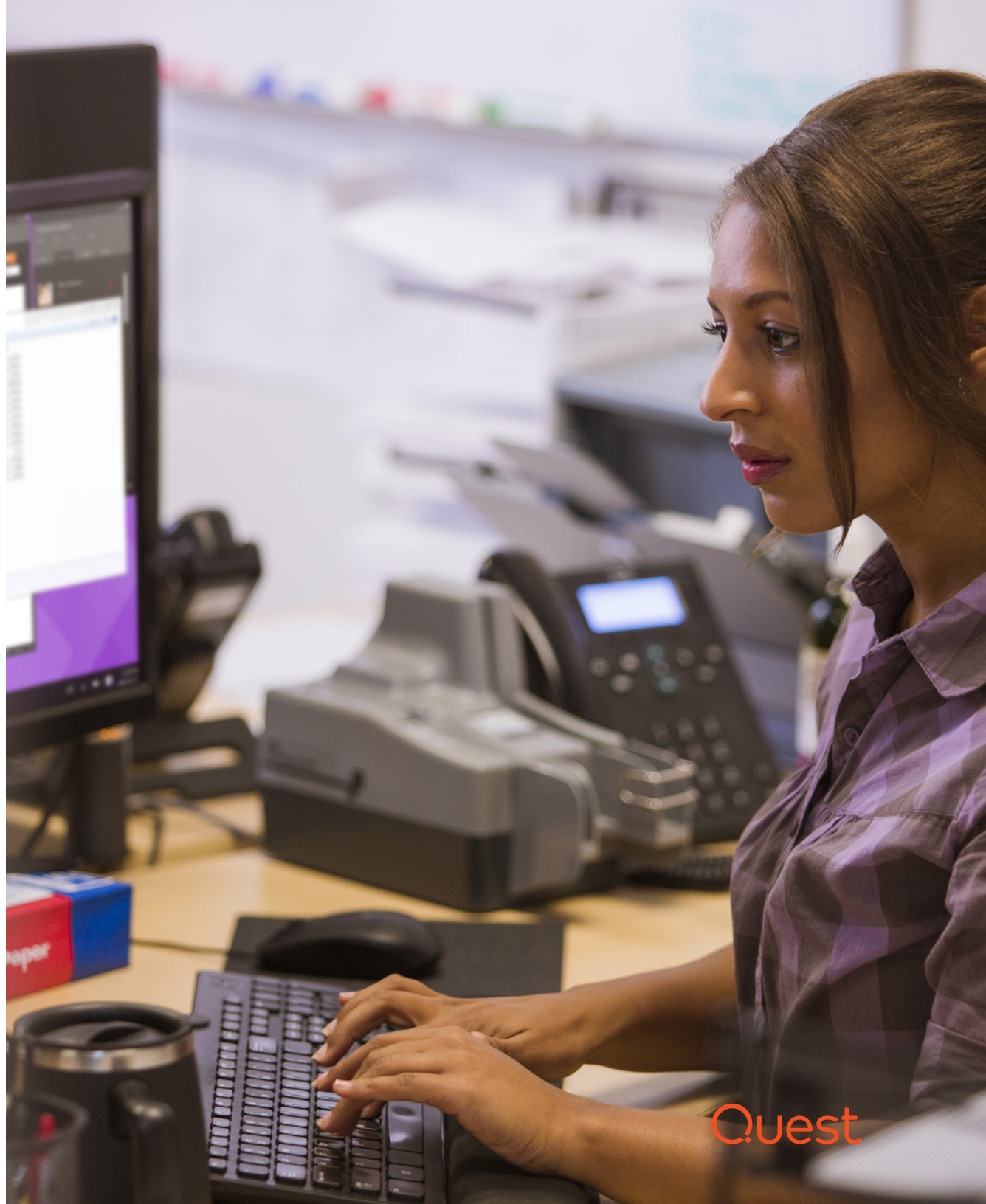
proper permissions and happy users. A quick web search will turn up plenty of articles about SharePoint migration, many of which emphasize the importance of preparation, but most of them fail to provide any practical guidance. This ebook is different. We'll explore the key steps to take to help ensure a truly successful SharePoint migration:

- Analyze and clean up your current SharePoint environment.
- Clearly define the scope of your migration.
- Understand the business drivers.
- Involve end users in migration planning
- Avoid the common pitfalls in migration planning.

Keep the goal of migration firmly in mind: a stable SharePoint environment with discoverable content, relevant metadata, proper permissions and happy users.

## Analyze and clean up your current SharePoint environment

The first step in migration planning is to clearly understand how SharePoint is actually being used. This analysis will enable you to better prioritize which sites and content might need to be migrated or reorganized first because the teams that use them are very active and rely on SharePoint for their day-to-day business. It will also help you identify stale or duplicate content that should be deleted or archived rather than migrated, as well as content that should be reorganized before migration, so you can deliver a target SharePoint environment that is cleaner, easier to navigate and use, and simpler to manage and secure.







There are many metrics that need to be reviewed but here are some that are often overlooked:

- **Permissions by user, by Active Directory or SharePoint group, or by permission level** — Get a clear picture of who is in the system and what they can do, and then work with your business counterparts to identify and remediate any problems. This process will help you ensure users can be productive in the target environment while maintaining security and regulatory compliance.
- **Usage and activity reports** — Reviewing page views, unique users, usage trends, top sites visited and other usage information will help you understand who is using SharePoint and identify inactive content and sites that can possibly be archived or deleted.
- **Audit reports** — Audit reports provide an even more detailed view into how people are using your environment and help you track events by user, date, scope, site and URL.
- **Storage reports** — Understanding storage use is critical to effective capacity and performance planning.

Understanding how SharePoint is currently being used will help you plan an effective target platform.



## Clearly define the scope of your migration

### WHAT IS SCOPE CREEP?

Consider this scenario: 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 and some of the new social media capabilities, which were to be left to a later phase. Fine. You extend the schedule a week so you have time to work with the 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 integration to the custom ticketing system the company built on top of their CRM and insists this be added to the migration. 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 infighting begins. 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 migration team, there is still this belief that the original project timeline — which was communicated to the board — is still what your team is committed to delivering.



## AVOIDING SCOPE CREEP

Sound familiar? Even the best project managers can get sidelined by office politics if they don't take the steps to clearly define and document the scope of the project — and get sign-off from all stakeholders. Clearly define and document your project deliverables up front and get approval from all project stakeholders and your executive sponsor. The SharePoint migration plan should detail the content, information architecture, web parts and solutions, and all other configurations that need to be cleaned up, upgraded or migrated.

It should also measurable success criteria that make it clear to everyone when goals have been reached, commitments have been met and the migration can be considered successful. Possible metrics 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.
- The successful migration of a specified number of sites or amount of content, such as 90% of the content databases.
- The successful migration of a certain percentage of file shares and the decommissioning of their hardware.

Take time to clearly define and document the scope of the project up front — and get sign-off from all stakeholders.





## Understand the business drivers

Understanding the business drivers for the migration will help you prioritize tasks and negotiate with various teams, vendors and stakeholders when decisions need to be made or risks need to be mitigated. For example, the following issues have nothing to do with the technical activity of migration but could very well impact the project plan and schedule:

- Are there cost implications for maintaining the current hardware? Is the migration going to enable 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 2019 by end of Q1 regardless of the impacts?
- Does your team have the necessary skills to accomplish the work, or do you have service providers with the right skills engaged and ready to begin working?

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## Involve end users in migration planning

Since my first hands-on experience with SharePoint migrations almost 10 years ago, one of the best practices I have always employed is to involve end users early in the planning process. Because they depend on the platform to do their jobs, it's important to keep them in the loop on what you're planning, get their help in prioritizing and classifying content, and inform them of changes as the plan is being executed. Moreover, involving them in developing the SharePoint migration plan is a key to long-term adoption, because the more you involve people in the process, the more likely they will support the outcome.

Some of the areas where end users should be involved include defining use cases, documenting the current environment, prioritizing requirements for target environment, and identifying and reorganizing content. Your users know their content, so let them drive activities around file share migrations, taxonomy development and metadata assignment, and be sure to include them as you get sign-off for the overall project plan.

How you include your end users depends on:

- **Who your users are** — Are they all power users or do many of them merely consume content from existing sites?

- **What the current environment looks like** — Consider not just look and feel, but how it is being used. Is it out-of-the-box or do you use it for more complex business processes?
- **The overall goals of your migration**— Are you moving the content as is, or do you need a complete transformation of content, taxonomy and design?
- **The culture of your organization** — How are users normally included in enterprise-wide projects? 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?

Also include users in designing options for training in using the new environment. With most migrations, content is reorganized and new features are introduced; don't assume that everyone knows how to use these new features or will be able to find the content they need in the new structure. While many people can become quite proficient without any formal training, some formal training can expedite the learning curve and help your business get the most out of its investment.

Your users know their content, so let them drive file share migrations, taxonomy development and metadata assignment.

# Avoid the common pitfalls in migration planning

Finally, it's important to learn from the experience of others. Here are the most common pitfalls that organizations encounter during SharePoint migrations — and how to avoid them.

## **RUSHING THE PROCESS**

Even small mistakes in planning can lead to huge problems down the road that can be difficult and expensive to overcome. In the movie *Spaceballs*, a tiny miscalculation for the jump into hyperspace lands the antagonist's spaceship in the wrong galaxy. Similarly, a flaw in your SharePoint data model or taxonomy could lead to big issues in your target environment. Don't rush the planning process.

## **NOT IDENTIFYING ALL OF YOUR CUSTOMIZATIONS**

One of the most common reasons for a failed migration job is a web part or custom site design that was overlooked during the planning. Of course, these failures always seem to happen at the most inconvenient time, like over a weekend or during crunch time, causing the maximum amount of duress to you, your management team and your end users.

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## **TREATING ALL SITES AND END USERS THE SAME**

In theory, out-of-the-box SharePoint sites will migrate cleanly. But sites with custom workflows, extensive dashboards and customized integrations will need care and hand-holding. Treating these sites the same as the more basic sites could break them, leaving the teams that use SharePoint the most in turmoil. Therefore, it's crucial to understand the needs and requirements of each team, especially the power users who depend on SharePoint day in and day out.

## **NOT COMMUNICATING**

Moreover, be sure to create a communication plan for your end users and partners. Publish regular updates about what has been completed, what is coming next and how long it will take to complete the migration. People will tolerate schedule slippage better if they know what is happening.

## **NOT TESTING**

A robust migration strategy allows for verification that permissions, navigation, look and feel, and content are all working as planned. 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.

## **GOING IN WITHOUT A ROLLBACK PLAN**

Back up your systems before attempting any migration. Most migrations follow Murphy's Law — anything that can go wrong will go wrong — so you need to have a rollback plan and a current backup.

## **NOT UNDERSTANDING PLATFORM DIFFERENCES**

If you are still working with SharePoint 2007 or 2010, then you need to understand that SharePoint 2013/2016/2019 is vastly different, so refactoring of your current design will be required. The user interface changed;

there are more service applications; considerable architectural changes have been made to the underlying platform; the application service has been reworked; and there are new business intelligence features. For example, SharePoint 2010 uses .NET 3.5 whereas SharePoint 2013 uses .NET 4.5, and SharePoint 2013 and later supports new app development models, including hosting the app in Azure.

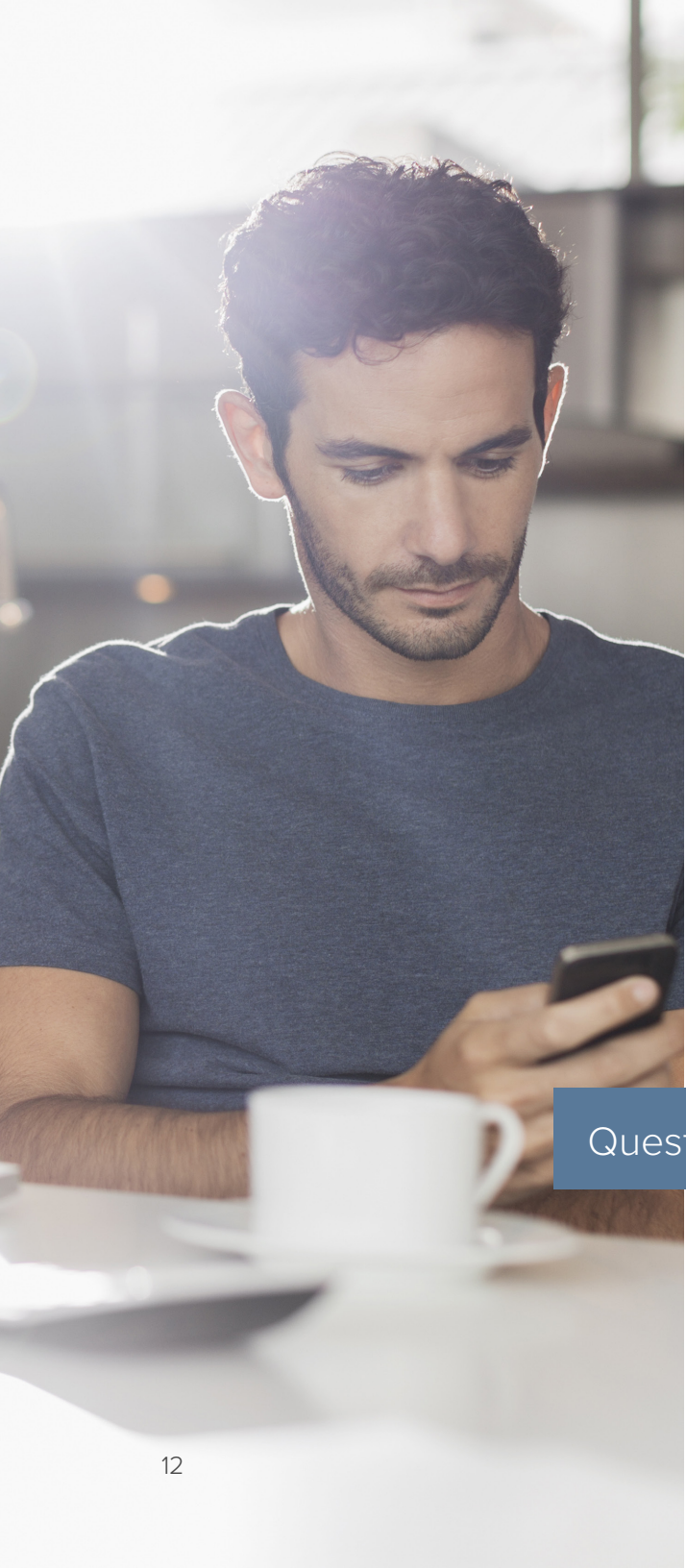
To take advantage of the features of a new version of SharePoint, you might need to refactor your current design.

In addition, with the explosion of mobile, Microsoft has invested heavily in ensuring that SharePoint can be consumed across multiple platforms, browsers and screen sizes by porting the platform to support HTML 5 and CSS 3 standards. Organizations must understand what is available on their target platform so that they can plan their refactoring efforts and the additional infrastructure that might be required.

## **JUMPING TO THE CLOUD WITHOUT ADEQUATE PREPARATION**

In SharePoint Online, there are no service applications, WSPs or sandboxed solutions, or SQL. The app model is different, and there are new modern site collection templates that will impact your design.

Before moving your entire farm to the cloud in a SharePoint Online migration, consider starting with hybrid — move your content across while both platforms co-exist. This gives you more time to get to explore the features available in Office 365.



## Conclusion

Migrations are inherently complex, and getting them right is essential to a host of business goals, from business continuity and user productivity to security and compliance. With proper planning and the right tools, you can realize your SharePoint vision.

Quest is ready to help you throughout every stage of your SharePoint migration project:

- **Pre-migration analysis and planning** — [Quest® Metalogix® Expert](#) is a free migration tool that will give you the insight you need to create a SharePoint migration project plan that optimizes your content migration, storage strategy and more.
- **Pre-migration cleanup and post-migration administration and governance** — [Quest Metalogix ControlPoint](#) will help you understand, manage, secure, automate and govern your entire SharePoint environment, whether it's an on-premises, cloud or hybrid SharePoint deployment.
- **Fast and comprehensive migration** — [Quest Metalogix Content Matrix](#) provides one-hop and high-fidelity SharePoint migrations with zero downtime and unlimited site and content movement. Its enterprise features are designed to reduce complexity and help you meet the most aggressive project timelines for any SharePoint migration scenario, from basic library, site and farm migrations to more complex scenarios like reorganization and metadata enrichment and transformation.

Quest Metalogix solutions can help you realize your SharePoint vision.

We'll help develop a comprehensive strategy and set up a migration that works for you — no matter how complex your collaboration environment is.



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