

Ultimate Guide to  
**MIGRATING TO  
OFFICE 365**

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# Introduction

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Productivity enhancing software speeds up, automates, and simplifies daily work processes. In most cases, it can also enhance communication, facilitate greater collaboration, promote organization, and add visualization to workflows to improve understanding.

Office 365 has set the global standard for productivity software. It has enabled over 120 million users, organizations, and small businesses to work faster, smarter, and more efficiently by bundling productivity services and applications with the traditional Microsoft Office Suite.

Microsoft has joined with leading IT industry advocates and has embraced the cloud model for software and services, making Office 365 available as a subscription-based software pack for Windows and Macintosh.

When you subscribe to Office 365, you get the latest versions of the ever popular Office Suite and the ability to install the software on up to five devices—computers, tablets, or phones.

Finally, Office 365 stores data in the cloud automatically, so teams can access their information and collaborate from any connected device.

In this guide, you will learn everything you need to know to successfully migrate your business to Office 365.

**Let's get started!**

# The Top Reasons to Migrate to Office 365

Let's begin with the top reasons you should consider migrating to Microsoft Office 365 and help your business achieve peak performance.

## Ease of Migration

First off, don't fear the migration! Respect it... but don't fear it.

At PICS ITech we use a proven migration suite to move your email to Office 365. It takes about a week and causes no interruption to your business.

Migrating all of your company's documents and legacy emails into Office 365 is easy, and fairly low impact, if approached intelligently and executed well.

## Cloud Availability

As we mentioned earlier, Office 365 is essentially Microsoft Office combined with Microsoft email, communications, and storage tools—all available and accessible through the cloud. After migrating, here is what you and your business have access to:



### Office Tools:

Word  
Excel  
PowerPoint  
And more!



### Email & Communication:

Exchange  
Skype for Business  
Teams  
Voice



### Storage:

OneDrive

With today's mobile workforce, Office 365 ensures your employees will have access to documents, email, storage, and internal communication 24 hours a day, 7 days a week, 365 days a year.

Office 365 is also ideal for small businesses. As your business grows, you can increase storage size and software capabilities to meet your needs.

## Device Compatibility

With Office 365 it's no longer necessary to rely on desktop computer access to take advantage of Office software. Word, Excel, PowerPoint, and other Microsoft products are available at any time, from any device, all via the cloud.

Whether you work on a Mac, PC, phone, or any other compatible device, you have full access to the entire Office suite. Getting work done any time, from anywhere, has never been so easy!

## Peace of Mind

Every system administrator's worst nightmare is a Microsoft Exchange/email service problem.

Did you know, with the current design for Exchange, it requires a small business to have three or more services just for email? It also needs competent engineers to support it.

With Office 365, you gain peace of mind knowing your server now exists and operates in the cloud, which means no localized outages, and no lost data.



# Planning Your Office 365 Migration

As we've already mentioned, Office 365 gives businesses—both big and small—the ability to collaborate and exchange information more effectively.

While it's easy to see how Office 365 can help your business, the migration process is always a concern. If you're considering this powerful suite for your business, follow these tips to make the migration process simpler and stress-free.

## Do Your Research

The good news is that if you are researching Office 365, you've come to the right place. By reading this guide, you'll gain knowledge and understanding about how everything works and what to expect throughout the migration process: before, during, and after.

Once you move to a cloud-based platform, your business operations will change. It is important for you to spend the time to educate yourself so you can understand and anticipate how and where your business's daily operations will be most affected.

Finally, know that traditional Microsoft Office programs and Office 365 applications have some differences in terms of functionality, features, and interface. As you plan your migration, do a quick Google search and you'll find dozens of informative articles on software specifics that relate to you and your small business needs.



## Create a Comprehensive Checklist

Don't make the same mistake that most businesses do and skip creating a detailed migration checklist. It's not enough to solely focus on the technical aspects of Office 365—you must also look at other issues that may be critical to your migration's success.

### Some vital areas to include in your comprehensive checklist are:

#### Informing users

- Gathering adoption feedback
- Training
- Updating desktop software
- Strengthening passwords

For starters, we recommend writing up a step-by-step plan that defines the phases of the migration process. You should continue refining your plan, as you learn and explore, until you are confident you have everything covered.

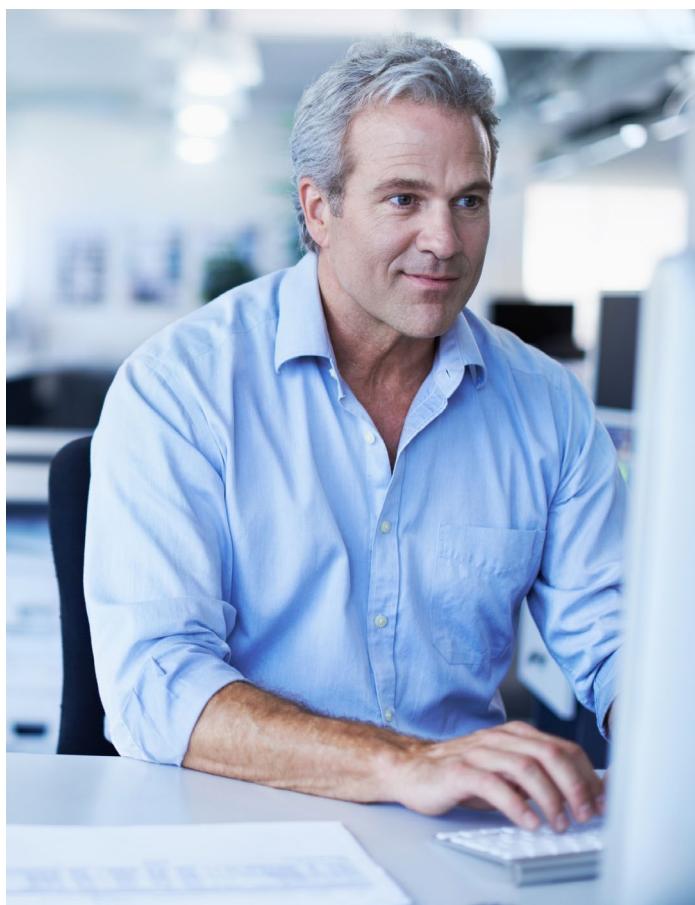
## Check Your Email Settings

For the smoothest migration possible, we recommend using Microsoft's Azure Active Directory Synchronization tool to sync accounts between your active directory domain and Office 365.

Don't forget! Point your company's email exchange record to Office 365 so you can send your new emails directly to the new mailboxes.

These steps will prevent a misconfiguration or a flawed email sync during migration, which can create chaos within your communications system. The last thing you want is to accidentally have your business's emails flagged as spam.

*(In the next section, we will go more into depth, examining your options for migration methods.)*



## Choose Your Migration Plan

Each migration plan looks different and it's important to pick the one that best fits your needs. In the next section, we'll dive deeper into each of these options to effectively determine your best route for an effective migration.

Office 365 migrations can be divided into three categories:

- **Cutover migration** - This is a single transfer of mailboxes, users, contacts, and mail groups to Office 365. This process can handle up to 2,000 mailboxes. The migration time depends on the number of users and mail volume.
- **Staged migration** – This is perfect for when you don't want to migrate all of your resources at once. It allows you to move mailboxes in smaller batches over a much longer period of time. This is a less dramatic and more gradual migration plan.
- **Hybrid migration** - This type of migration is perfect for larger organizations (but not always a great fit for small businesses) that need to move more than 2,000 mailboxes. If your business is growing and expanding rapidly, this option may be worth investigating further.

## Test Your Migration Process

Finally, the last step in planning your migration process is to design a testing procedure for each phase.

Start by migrating a small amount of data, sending and receiving emails, and application trials to ensure that everything works as expected. Think about it—everything you test before migrating to the platform reduces the risk of your business running into unexpected problems down the road.

If you're considering an Office 365 migration, why not let our expert technicians do the job for you? We can seamlessly migrate your business without disrupting your operations, communications, or capabilities.

[Get in touch today to learn more!](#)

# Select Your Office 365 Migration Method

We've shown you how moving to Office 365 creates considerable gains and advantages for your business's operational efficiency. All your devices sync to a single system and you gain the advantage of automatic updates that enhance your security and reduce downtime. You can even set these updates to avoid work schedule conflicts.

However, before you reap these amazing benefits, you will need to finalize the migration of your data to the new system. Not all Office 365 migration methods will be effective for everyone. Understanding how your business operates and what systems you've used to date will help you determine the right approach for your organization.



## 1. Exchange Migration

If you use an Exchange server, you can migrate all of your email data over to Office 365 servers. A cutover migration performs the process all at once. It works well for up to 2,000 mailboxes; so if you have more than that, you cannot perform a cutover migration. It also takes several days to complete this process. You will operate on your Exchange servers until the process is complete, at which point everything switches over to the Office 365 servers; there is no overlapping usage between the two.

The advantage of this method is that it avoids having different users on different servers at any given time. Once you complete the process, everyone shifts over together. It's all done at once and you are up and running on cloud servers, with no need to schedule future migrations. You finish, and you move on, making it one of the more efficient Office 365 migration methods available.



## 2. Staged Exchange Migration

If you have too much email data to do a cutover exchange, or if you prefer moving different departments at different times, a staged migration may be the answer. You still have a limit of 2,000 mailboxes, but you can organize them in a way that makes sense for your organization. Unlike other Office 365 migration methods, this allows you to work on different servers—overlapping those moved to 365 with those that remain on Exchange servers—until the process is complete.

Depending on your company's needs, this can be a decision based on necessity or a direct strategy to preserve data. Some companies find that they prefer using both servers until they know the migration is completed without error; others may want to avoid the IT headaches of managing two information workflows at the same time.





### 3. Hybrid Exchange Migration

If you run Exchange 2010 or 2013, you cannot run a staged migration to Office 365. Thus, a company with more than 2,000 mailboxes will be unable to use either the cutover or the staged Office 365 migration methods. Fortunately, a hybrid migration is possible.

In this process, you begin by creating new accounts for each user in Office 365. From there, you copy the data over from your Exchange server to the Office 365 server. Like the staged method, this allows you to move data over time, in groups of users by priority, or by department priority. The process can be rather time-consuming, but it lets you move data in ways that the other two methods prevent and gives you considerable control of what happens when.



### 5. IMAP Exchange Migration

If you have previously operated in another IMAP-enabled email environment, you may use IMAP migration to move your data to Office 365. This method does not automatically create or replicate mailboxes so, similarly to the hybrid Exchange migration, you have to create new accounts for each mailbox and then populate them with the migrated data.

This process is a little more cumbersome, but it allows you to move your data even if you were not previously on Exchange servers.



### 4. PST's or PST Files and Sharepoint Office 365

Office 365 migration methods include non-Exchange server files as well. If you have a large number of PST files, Office 365 provides two methodologies for importing them: cloud migration or hard-drive migration.

In a cloud migration, you use the Office 365 upload tool to place files onto cloud servers. If you have concerns, or want to avoid deprecating your on-site bandwidth with this process, you can also save your files to an external hard drive and send it to Microsoft. The files are then downloaded to Office 365 servers at the physical server location.



### 6. Manual Import

Finally, rather than running everything through your IT department, you can have your end users import their own data. This approach relieves the burden on your IT team members, and can make the process go fairly quickly.

On the other hand, you may not want to risk the larger probability for error that comes from having that many hands involved in the migration process. You need to ensure instructions are clear and your workforce is capable before you employ this method.

# Common Migration Challenges for Small Business

You'll need to keep the following challenges in mind when migrating to Office 365 to save time, money, and ensure a smooth transition.

Your Office 365 migration might seem straightforward but, for many small businesses, the full Office 365 suite can often prove to be more complex than anticipated.

Migrating to Office 365 touches every area of an organization and therefore must be carried out methodically to ensure success. Even if you're a small company migrating from a small email server, each migration scenario will present a variety of challenges.

You will save your business time and energy during the migration process by understanding some of the potential roadblocks that may lie ahead.

## Employee & Leadership Buy-In

Before you migrate, it's important to establish the support of key employees and leaders throughout your business. Many small companies struggle to embrace change because the systems they have in place "work" and "everyone already knows what to do."

By helping others understand the advantages Office 365 guarantees, you can secure buy-in and generate support for the migration.

## Office 365 Training

Training is important any time you want to implement a new software or solution such as Office 365. Properly training your employees before migrating is a way to improve your odds for a seamless transition.

Long before you ever decide to migrate to Office 365, it's vital to put together a team of individuals that will be willing to help those who may take longer to master the new Office 365 platform.

## Stable Internet Connectivity

Office 365—like any platform that operates in the cloud—is reliant on a stable internet connection. If your internet connection is spotty and you're looking to migrate your on-premise server to the cloud, you can expect to experience delays.

If you plan to migrate much of your data over a period of a few days, it's important that your internet connection remain steady the entire time. While your business may have a reliable internet connection, speed is also important. The amount of data that needs to be transferred—even by a small company—can be quite large.

## Support Resources for New Users

Your small business might not have a designated IT team that can support and troubleshoot issues for new users.

For companies in this scenario, we recommend creating a “self-service” support portal that your employees can access. This will be a place where they can learn about new features, troubleshoot common issues, and get the help they need when they need it.

# Ensure Your Security

In this guide we've covered every essential for transitioning from an on-premise SharePoint system to a cloud-hosted Office 365 solution. Now, let's make sure you have sufficient protection to counter the security challenges that come with the migration.

Many businesses who are contemplating switching to the cloud are rightfully concerned about bad actors attempting to breach the cloud-based security of Office 365 itself. However, because of the robust safeguards Microsoft has in place, localized issues are far more likely to be your network's weak point.

The following essential steps will help ensure your transition from SharePoint to Office 365 is smooth and secure.



## Identify Your Company's Sensitive Data

First off, ensure that sensitive information is identified and protected. Do this by conducting a security audit before you undertake your migration.

Your audit should identify the data stored in the various parts of your SharePoint network, including which specific information needs extra safeguarding. Be sure to consider everything from trade secrets and contract details, to the personal information of your employees and clients.



## Restrict Access to Your Company's Sensitive Data

Once you've discovered and pinpointed where your most sensitive data is stored, you can check who in your company has access to it. Now is also a great time to reevaluate whether their access is appropriate and/or necessary

After officially migrating to Office 365, you'll find that it allows you to conveniently set different permission levels, including those of external partners.





## Be Vigilant of Top-Level Users

Audit everyone in your organization for data access permissions, including your system administrators.

Addressing the dangers of an “overly powerful” administrator becomes easier if you have more than one on staff.

In smaller businesses, you can easily mitigate some of the risk of having too much oversight within one role by regularly checking your administrator’s usage. This will ensure, over time, that their top-level system permission settings remain justifiable as you grow and their position evolves.



## Foresee Security Breaches via Machine Learning

Office 365 logs every action performed by your staff and, at any time, you can access analytical reports to examine actions in more detail. However, the enormous number of events taking place within Office 365 during your business’s normal operations means identifying questionable behavior will be very difficult.

Luckily, it’s possible to leverage the developing power of machine learning to identify potential breaches before they occur.

Office 365 has incorporated Graph API. This allows integration of machine learning tools into your security environment. This tool also works to catch hackers and malware by identifying login attempts not associated with your business.



# Are You Ready to Take the Next Step?

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If you're considering an Office 365 migration, why not let our expert technicians do the job for you? We can seamlessly migrate your business without disrupting your day-to-day operations.

We'd love to show you the unique advantages a migration to Office 365 would create for your company and how it can be done quickly and effectively.

[Get in touch today to learn more!](#)

## ABOUT PICS ITECH

PICS, co-founded by Terry Rossi and Richard Rosenthal, has been helping small businesses optimize their internal and customer-facing security since 1995. They've worked with companies from around the world in nearly every industry to establish highly effective security protocols and dramatically reduce their risk of attack. PICS is continually working to improve their abilities in order to stay on the cutting edge in the ever-evolving world of IT security.

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