6

Six Steps to a
**Successful Office 365
Migration**

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Computer Learning Centers

Microsoft reports that there are already more than 80 million monthly active business users of Office 365, and every day, more and more businesses are migrating. Why? Because there's an endless list of benefits to migrating to Office 365 such as better security, anytime-anywhere access to applications, improved collaboration tools, simplified maintenance and more. But if you're reading this, you probably already know that.

While some companies have already made the switch to Office 365, many remain uncertain about the transition, with most fearing the migration process itself. As with any major transition, an Office 365 migration can present some roadblocks, but many are easily addressed for a smooth transition to the cloud.

Very often, decision makers are unaware of the tremendous impact the migration can have. Many concerns and questions come up when deploying new software throughout an organization. If you're thinking of making the switch yourself, keep reading.

It will come as no surprise to learn that every company is going to approach an Office 365 implementation a bit differently; but what you may fail to think about is what a successful migration plan would look like for your business.

A simple but important question that you should ask yourself: "What key performance indicators (KPIs) will you use to determine whether or not your Office 365 migration was a success?"

You probably aren't anticipating these kind of questions, which can lead to an initial response along the lines of:

"We don't want our **Help Desk** to get flooded with **calls and emails** about basic Office functionality and troubleshooting.

And we certainly do not want to see a **dip in productivity** because our end users are **struggling** with the new software tools!"

Fair enough. In order to truly gauge the success of your Office 365 migration, you should go into this process with highly defined KPIs, so that you can measure the success throughout the duration of the migration.

This is very important, since arguably, in the beginning stages of the migration, everything may not go 100% according to plan, and you may have to pivot and make adjustments. But if you aren't measuring anything and haven't established KPIs, then it will be quite difficult to know whether or not the Office 365 migration was a success, and if it was well received by your employees. All you will get is anecdotal feedback, without the ability to pinpoint hits or misses. And more importantly, your senior leadership will not to be able to see what the positive and negative impacts were of this migration and what you would do differently next time.

Here are a few things to consider to help you measure your success:

Establish a Starting Point First, before implementing Office 365, get a baseline of your Help Desk activity as it currently stands. Go back 90 days during a typical time period, and get a snapshot of what your daily Help Desk looks like. You can use this baseline as a comparison point after the migration.

Monitor Activation and Adoption Within Office 365, there are some basic reporting tools that are included, which will allow you to see who has and has not activated their Office 365 accounts. More importantly, you can see who is using or not using specific applications. Track this over an extended period of migration to see who is using the software and at what duration.

Ask for Employee Feedback You might consider sending out a company-wide survey several weeks after Office 365 has been fully deployed and ask how they rate the software compared to the legacy version. You can also decide to send out a survey before the migration to inquire about the legacy software to determine where your employees would like to see better functionality and usable of the software they are using.

4

2

How can I avoid overwhelming my IT Department and end users?
INTRODUCE OFFICE 365 APPLICATIONS IN A PHASED-IN APPROACH.

If your plan is to implement a *Business or Business Premium* version of Office 365 that includes a host of services, such as Microsoft Teams, SharePoint Online, Delve, Yammer, and more, it is recommended that a phased-in approach be taken for deployment. Don't try to implement every product and service all at once. This can be overwhelming, both to the IT Department and to the end users.

Instead, pick the applications and services that you feel are most essential and can be deployed with the least headache. Get a handful of those implemented, and build on that positive experience, and then start to layer in the other application and services.

How to Phase-In

Phase One	Phase Two	Phase Three	Phase Four
This phase typically involves Outlook, followed quickly by Skype for Business. Setting up stable communication first will help make the rest of the process smoother.	Next would be the core Office products: Excel, Word, PowerPoint, etc.	Once the core products are launched, SharePoint and OneDrive can then be deployed.	Finally, now is the time to look at launching ancillary products, such as Delve, Sway, Teams, and Yammer.

The phase-in process may be different for each business; the details can be worked out between management and an IT advisor to figure out what your business's needs. The example given above is a great basis to start off of. If you're still unsure, reaching out to a learning partner can help you decide what is or isn't vital.

3

How can I encourage employee acceptance?
INCORPORATE A CHANGE MANAGEMENT PLAN.

Businesses often underestimate the impact of change. When you decide to deploy Office 365 to employees who are unfamiliar with the new tools, you are changing their work environment – and to some users, this can be a dramatic change, which can lead to ill feelings. Without any communication about why the change was made, some employees may not understand the value and only focus on the negative impact.

At least 30 days before the actual software is launched, your business may want to consider incorporating some sort of change management plan as part of the Office 365 migration. It's really important to effectively communicate to your employees why the company has decided to adopt this new software, making sure to highlight the many benefits to the end user. This can be done quite easily by creating and sending an email to your staff that discusses the plan to migrate and why your business has chosen to do so. Plus, if resources allow, you can even consider creating exciting media attention, such as videos that discuss the plan and purpose of the migration. Either way, be sure to communicate this change early on and express to your employees that you have their best interests at heart.

Use this Management Plan Checklist to make sure all the bases are covered before you start deploying Office 365.

- ☐ Announce migration plan.
- ☐ Clarify why this decision was made and highlight benefits for end user
- ☐ Create media attention to generate excitement for the migration
- ☐ Offer prior training to make sure employees understand and utilize latest product features
- ☐ Phase in all services to avoid overwhelming IT and end users
- ☐ Seek experienced teaching help if you still feel unprepared

4 How can I avoid the loss of productivity?
EDUCATE YOUR EMPLOYEES PRIOR TO LAUNCH.

So, you've implemented Office 365, given ample notice as to not blindside your employees and now it is being used. The problem you're seeing though is that productivity is going down. You can follow all the steps and there is still a chance for this to happen. The problem many employers have is assuming their staff knows how to use the new software.

"I have found that there is an assumption that end users will adapt quickly and easily to the new software, since many of their employees are already using Office 365 at home. This can be dangerous. The way people use software at home is much different than how they would or should [use it] for business."

Tynan Fischer
Chief Operating Officer
NH Learning Solutions Corp.

Let's say your business consists of 5,000 employees and all of them spend 10 minutes a day training to figure how to use a specific feature – over time, this can equate to thousands and thousands of unproductive hours. This is why prior training is so important. If your business launched Office 365 with the intention of increasing collaboration, yet never trains your employees on how to leverage the available collaboration tools, there is a very real chance that they are not going to make the most out of the new software on their own. Offering insight before the launch can help your staff get off to a good start once the migration process is complete.

Typically, when new software is introduced, the user will look first to uncover what is new, get comfortable with some of the tools, and incorporate them into their daily activities the best that they can. But is this true proficiency? Are your employees making the very most out of the new software? Don't you want your end users to go beyond just knowing how to use Excel? Of course you do!

Every version of Office is created to help businesses work faster and smarter, but if employees are unaware of these advancements and don't know how to incorporate them into their daily duties, how will any business ever see a return-on-investment?

Getting the Most Proficiency out of Office 365

True proficiency with Office 365 is being able to integrate soft skills with that technology. So it may be easy for you to work in Excel to compile data, but from a soft-skills standpoint, how do you analyze that data to drive business decisions and affect change in an organization? This new level of proficiency is much different than teaching your employees simply how to use Excel.

Same thing goes for Skype for Business. For example, let's say you have a team of mostly remote workers. You not only want them to know how to use the features within Skype but also how to conduct a powerful and effective meeting, leveraging all of the tools. Don't you want to learn how it can help you manage your team better? If the answer is anything but yes, you're in the wrong business. Providing training is truly how to achieve the best productivity.
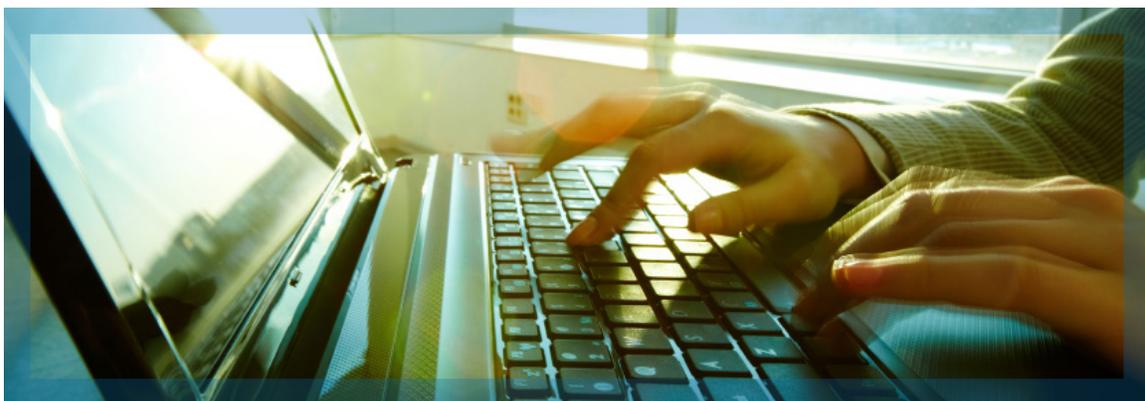
6

What if I lack the expertise for a successful migration?
CONNECT WITH AN EXPERIENCED LEARNING PARTNER.

There is absolutely no harm in reaching out to a learning provider like NH Learning Solutions and exploring your options. You may decide to implement some sort of training as part of the Office 365 migration or maybe not. At least you can hear about some of the services that are offered that can help you be successful.

If you are in the middle of a migration or planning to migrate soon, the earlier you can engage with a learning provider, the better. When it comes to training your employees, there is no one-size-fits-all solution, and there are many flexible options. Reach out to for a free consultation, and those providers will work to acquire a comprehensive understanding of your business and what you hope to gain out of the migration. A tailored learning plan will ensure that you get all of the services and support you need.

"My role is managing the learning resources, which consist of trainers, courseware, and curriculum—bringing them all together into a comprehensive program that help an organization successfully educate and migrate their users to a new version of Office."

Tynan Fischer
Chief Operating Officer
NH Learning Solutions Corp.

Migrating to Office 365 can and should be a positive experience for your business, and if you follow some of the guidelines laid out above, you may find yourself avoiding some of the many common pitfalls. Still, if your true goal is to eliminate the impact that an Office 365 migration can have on your IT staff and help desk, and avoid any loss in employee productivity, then you should develop and then implement a full learning solution as part of the migration.
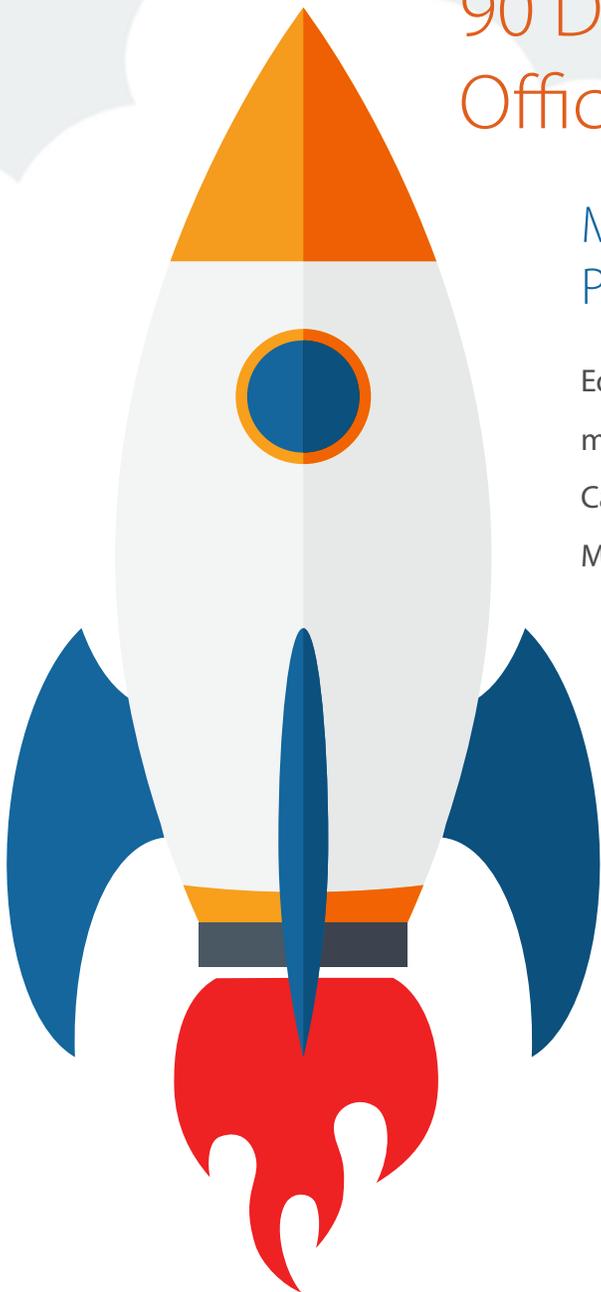
90 Days to a Pain-Free Office 365 Migration

Make Sure Your Team is Prepared for Take Off

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