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Overcoming the Top 5 Obstacles to Office 365 Migration

Just as employees start feeling comfortable with the latest on-premises version of Outlook, the company decides it's time to take advantage of the cloud with an Office 365 migration. Now Outlook looks different, and there are new tools people are supposed to use, like SharePoint and Yammer. When companies introduce lots of new functionality with little preparation, they leave many users wondering just how to use these tools and why they should bother learning them.

It sounds a bit paradoxical, but if you want a smooth Office 365 migration, the key is planning for obstacles along the way, rather than counting on smooth, continuous progress. This tip sheet looks at five obstacles companies often encounter at the outset of an Office 365 migration and suggests strategies for overcoming them.

Top 5 Obstacles To Your Office 365 Migration

These are the top five obstacles organizations often face during an Office 365 migration.

1. SECURITY CONCERNS:

The first hurdle is getting people comfortable with the idea of cloud applications and educating them on data security in the cloud. Cloud migration often prompts a natural anxiety among people who are used to having their information stored on-premises, in tangible servers that run in the back room and applications installed on their desktop PCs.

Even when users understand the advantages of the cloud and how data is secured in a multi-tenant environment, moving familiar applications into the cloud may initially feel like a loss — a loss of security, control and familiarity.

2. INABILITY TO MEET UNIQUE BUSINESS NEEDS:

Every organization develops its own ways of doing things, for better or for worse, and many operate under tight regulations. When moving to a cloud service, the solution must be flexible enough to accommodate existing business processes and security needs. If implementing Office 365 required your company to radically change the best aspects of how it works, making that change would be disruptive at best and utterly untenable at worst.

Many organizations currently operate in hybrid IT environments. In other words, they keep certain data and resources on-premises, while putting others in SharePoint Online and Office 365. For federal contractors and organizations in heavily regulated industries, cloud solutions need to accommodate specific data security requirements. These organizations may want to keep sensitive information in an on-premises or internally managed data center, while moving email, SharePoint sites and corporate intranet to Office 365.

3. RESISTANCE TO NEW TOOLS:

Once users have time to rationalize it, there's really no terrifying leap between the familiar Office productivity tools and using Office 365. There's still Outlook and Word — the same toolset and functionality — but it's a new Outlook and a new Word. And then there are new functionalities, such as SharePoint and Yammer. Too often, companies fail to anticipate resistance to seemingly small changes. At minimum, expect some users to dig in their heels or drag their feet. If the changes come across as radical and capricious, expect open revolt.

4. LACK OF PLANNING:

The fourth obstacle stems from lack of planning. Too often, companies want to simply roll out the new solution as quickly as possible and be done with it. But it's important to properly plan your Office 365 migration and develop a strategy for rolling out additional functionality over time, or you risk overwhelming users. The rollout plan or roadmap usually involves addressing email first and pushing out the Exchange migration. Following that would involve a prioritized schedule of functionality that would involve SharePoint Online, Yammer and perhaps Lync. Any of these may be combined with the initial Exchange migration and would likely be determined based on the solution from which the organization might be moving (Google apps, earlier Office versions, etc.).

5. POOR COMMUNICATION:

Even if you have the world's greatest plan for your Office 365 migration, failing to communicate that plan causes the same problems with overwhelming users and inviting resistance to change. If your implementation doesn't include ongoing communication, many people won't truly understand what these new tool do, how to use them or why they should care. Readily available tips and videos that are easily accessible when needed tend to work better over the long term than single big-bang training sessions.

While each of these five obstacles could cause serious setbacks, taking a proactive approach helps you ensure a smooth Office 365 migration.

Overcoming Migration Obstacles

As with any significant technology initiative, it's helpful to approach migrating to Office 365 as a process, not an event. A lot of effort and strategy goes into the change before the first user logs in, and ongoing efforts and strategy should continue after the launch. By thinking in process terms, you're on the right path to managing the change process, rather than trying to manage a technology event.

A good place to start is by mapping out any issues you're likely to encounter — including the five obstacles listed above. This is a great time to start talking to different people who stand to be affected by the Office 365 migration and getting their feedback. Getting end users involved early in the process helps cultivate a sense of ownership and participation.

From there, develop a planning roadmap for the Office 365 migration, clarifying the intermediate goals along with the steps and process you'll need to accomplish them.

Ideally, this roadmap should present the larger arc for these activities and a rationale for their order.

In some ways, the purpose of developing a planning roadmap and gradual rollout is to sell the project to your employee base. The management team may have already decided to make this investment in Office 365 and understands the rationale, but it's up to you to communicate the value proposal to your employees through ongoing advocacy and communication. What you don't want to do is take people so far out of their routines that you create anxiety and resistance.

To avoid overwhelming users, look for ways to incorporate the new functionalities into their daily routines. For example, most people use their email throughout the day, so that's a good place to start introducing new elements, such as showing people how to link to SharePoint sites from Outlook. Find out where employees work every day and incrementally demonstrate new tools and functions in that space.

In the end, it might seem easier and simpler to take an authoritarian approach: Just set up Office 365 and tell people to start using it. In the best-case scenario, that strategy produces mediocre results and unimpressive productivity gains. In the worst case, everybody throws up his or her hands in revolt, the project grinds to an ignoble halt and a promising technology investment is a loss.

The outcome all depends on the approach. Any of the five obstacles to an Office 365 migration highlighted above could derail or diminish the implementation, but good planning and foresight helps you avoid certain pitfalls and be proactive about minimizing others. By planning for obstacles along the way, you help ensure a smooth process so that your organization gets the most out of Office 365.