

# THE MOVE TO OFFICE 365

KEY INSIGHTS TO PRODUCTIVITY IN THE OFFICE 365 CLOUD



**Metalogix**

# PRODUCTIVITY IN THE CLOUD

*"While 8 per cent of business people were using cloud office systems at the start of 2013, we estimate this number will grow to 695 million users by 2022, to represent 60 per cent."*

*- Tom Austin, Vice President and Gartner Fellow. <sup>1</sup>*

It's no secret that organizations are actively investigating how cloud-based services can help them be more productive and efficient. The debate between "rent" versus "buy" has been going on for a long time, but the last few years have shown that "renting" has become a far more viable option.

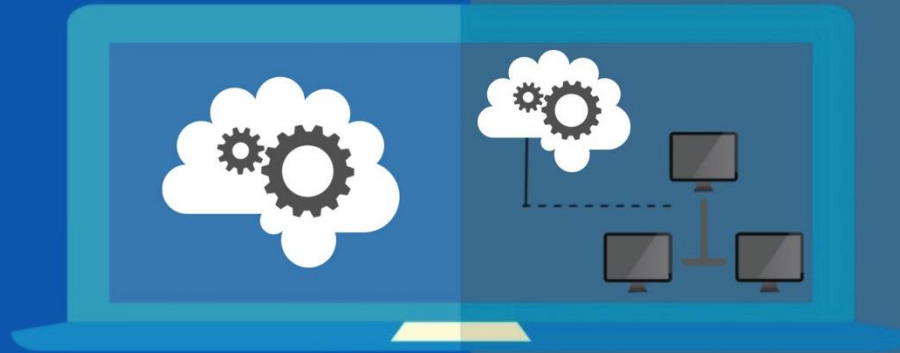


Signing up for Office 365 and using services such as Exchange Online, SharePoint online, Yammer, and others, enables organizations to get their basic productivity and collaboration environment in place quickly, allowing them to work with employees and partners anywhere, anytime. It's about effective collaboration. It's about efficiency. **It's about productivity in the cloud.**

## WHY THE CLOUD?

- ✓ With on premises software, IT spends a great deal of its time simply managing hardware, software and networks. With cloud-based solutions, IT can refocus its attention on the business and helping business owners create innovative solutions that will make them competitive in increasingly competitive markets.
- ✓ Another reason is the speed at which businesses can get up and running. Building, testing and deploying on premises software can take months or years, whereas signing up for a similar cloud-based solution can be done in a matter of weeks.

# Cloud Models



## CLOUD ONLY

Organizations go all in, moving their entire environment into the cloud, including Active Directory, Exchange, SharePoint, OneDrive, etc.. In terms of pure return on investment, this is the ideal scenario.

There are few organizations that have been able to fully embrace this model. When it does occur, they tend to be smaller or with light duty or no SharePoint implementation. That said, there have been several Fortune 1000 companies that have committed completely to the cloud.

## HYBRID CLOUD

Organizations who have moved some aspects of their environment into the cloud, while keeping either part or all of their SharePoint implementation in-house.

From a glance, this is the best of both worlds. Customers can leverage the benefits of the cloud, while maintaining sensitive data and customized environments on-premises.

On the other hand, it is also arguably the most challenging, requiring definitive decision-making on what should and should not be transitioned to the cloud.

“At our core, Microsoft is the productivity and platform company for the mobile-first and cloud-first world. We will reinvent productivity to empower every person and every organization on the planet to do more and achieve more.”  
- Satya Nadella, Microsoft CEO<sup>2</sup>

## WHY OFFICE 365?

Regardless of the approach you choose, there is much to consider when making the decision to move to Office 365. Read on as we examine the benefits of Office 365, along with migration planning, and how to manage your Office 365 tenancy going forward.

Depending on your subscription, there are a number of services with Office 365.

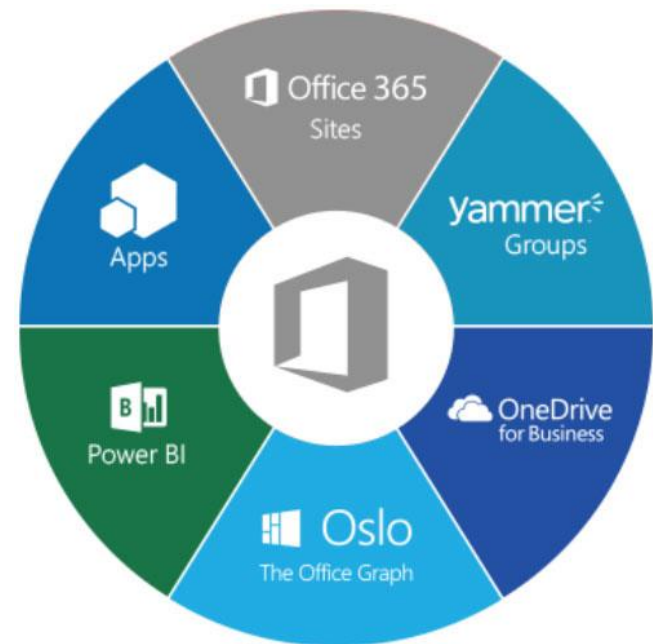
For E3 subscriptions, you get:

- ✓ Fully installed Office
- ✓ Office Web Apps, including Office for tablets and smartphones
- ✓ SharePoint
- ✓ OneDrive for Business
- ✓ Exchange
- ✓ Lync
- ✓ Yammer
- ✓ BI

### DID YOU KNOW?

Office 365 is now on a \$2.5 billion annual run rate. \*

- ✓ Office 365 had \$1.5 billion in revenue in 2013
- ✓ 60% of Fortune 500 use Office 365\*\*



\* <http://blogs.office.com/2014/04/28/thinking-outside-the-box/>

\*\* <http://channel9.msdn.com/Events/SharePoint-Conference/2014/KEY01>

## COST SAVINGS

There are many reasons to move to Office 365, ranging from cost savings, to security, IT benefits and effective collaboration. Your needs will be unique, but here are some of the reasons the move just plain makes sense.

An Office 365 subscription costs less per user than installing all the same tools on premises. Office 365 carries a basic subscription price of \$23.20/subscription/month (1 year commitment).\*

Compare this to the price of licenses for SharePoint on premises, Office, Exchange, Lync, Business Intelligence and OneDrive for Business, and you'll begin to see how quickly the costs add up. Now add to this the cost of the physical servers and the IT administrators who will need to be trained to manage the applications.

Subscription based pricing is typically lower and more predictable than installing on premises servers and licenses. This is partly due to Office 365's multi-tenant architecture.

The enterprise versions of Office 365 also provide unlimited data storage and archive. This includes unlimited storage space allotted to each OneDrive for Business account activated in your tenancy.

\* Subscription costs as of October 2014



### DID YOU KNOW?

Office 365 subscriptions are based on a multi-tenant model, where a tenant is a single organization with multiple user subscriptions to a set of services. In the Office 365 multi-tenant architecture, many tenants share a single server farm. This results in a lower subscription cost per tenant.

## BUSINESS BENEFITS

Today's approach to work is very much an "anywhere, anytime" model. Employees no longer sit in a 4x4 cubicle during a traditional 9-5 workday. Many are on the go, either traveling, working in remote locations or on client sites.

As a cloud-service, Office 365 supports this way of working, ensuring that employees have access to the tools and information they need to do their job whenever they want.



## BRING YOUR OWN DEVICE

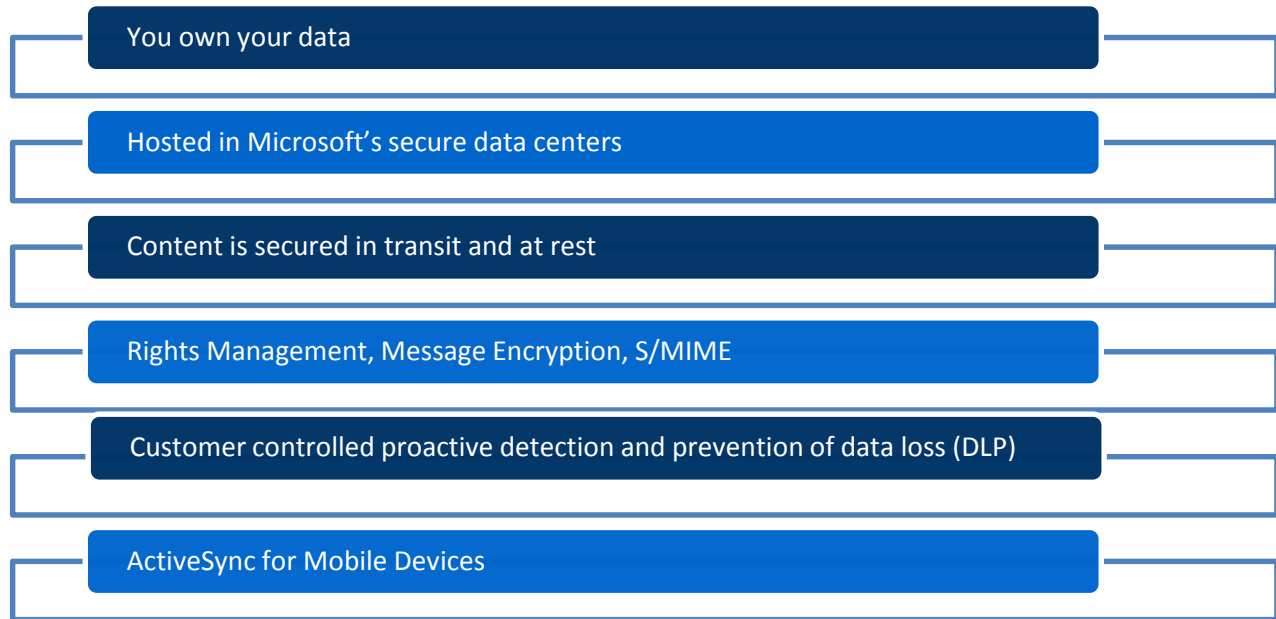
To go along with this working model, is the idea of access via mobile. And not just using organization-provided mobile devices, but user-owned mobile devices.

Office 365 supports the BYOD (bring your own device) model, partly because it enables employees to use the device of their choice, which makes them more efficient and effective in their work. Through policies such as device wipe, password and encryption, and more advanced Rights Management, organizations can ensure company information won't get into the wrong hands if a mobile device is lost or stolen, or an employee leaves the company.

# SECURITY

Some say cloud services like Office 365 aren't secure, and you don't own your data.

**That isn't true.**



Learn more about the security you have in the [Microsoft Office 365 Trust Center](#).

(<http://office.microsoft.com/en-us/business/office-365-trust-center-cloud-computing-security-FX103030390.aspx>)



## IT BENEFITS

### Features

Rolled out regularly, no need to wait 2-3 years for the next version

### Start Small

You don't have to buy everything at the beginning

Upgrade easily using the Office 365 Switch Plans Wizard

### Reliability

Enterprise Grade  
Guaranteed 99.9% uptime  
Financially backed service-level agreement (SLA)

24/7 phone support and an online support service for less important issues

### Custom Apps

Microsoft's Cloud App Model (CAM)

Use web standards and technologies  
Secure, better performance

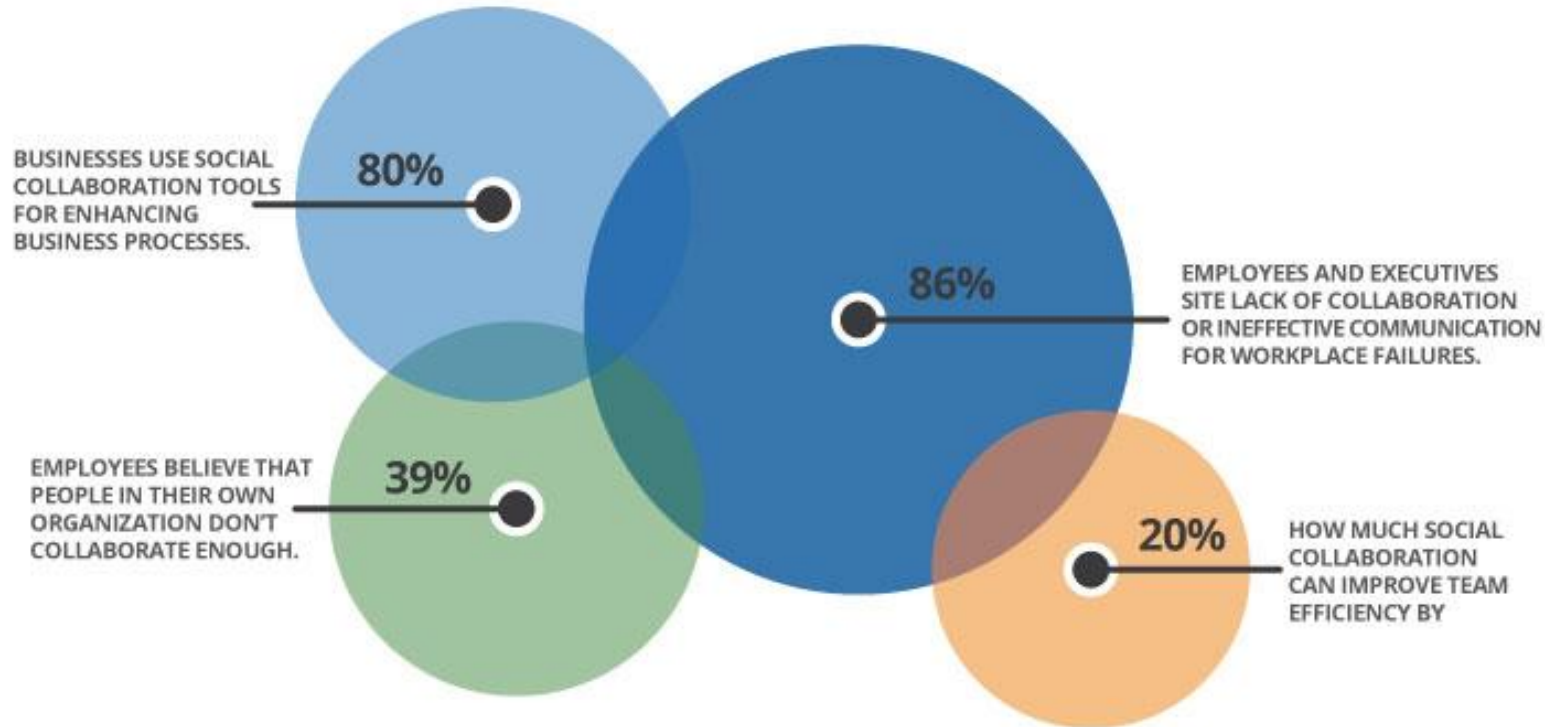
**DID YOU KNOW?** Microsoft is committed to regular updates to Office 365 and provides a roadmap (<http://office.microsoft.com/en-ca/products/office-365-roadmap-FX104343353.aspx>) to keep you up to speed on what's coming.

Forrester predicts the public cloud market will reach \$191 billion by 2020. <sup>8</sup>

Cloud services and SaaS bring high degrees of automation, standardization, and autonomy that empower the business to work faster, more flexibly, and adopt new capabilities more readily. The economic model of cloud computing yields greater efficiencies through shared consumption, pay-per-use pricing, and volume economics. It will be increasingly difficult to justify not leveraging cloud services.

# COLLABORATION

Office 365 provides an environment where you share documents and other files, collaborate on projects, and otherwise share thoughts, advice and information. It does this in an environment where you can securely grant access to outside individuals without giving them access to your network where you have business applications and store highly sensitive information.



<https://econsultancy.com/blog/10986-75-of-businesses-to-use-social-collaboration-tools-in-2013-infographic#i.11duthau2e7dsy>  
<http://work.com/blog/2012/08/is-poor-collaboration-killing-your-company-infographic>  
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If you work directly with customers, you can even share content with them that is stored in your Office 365 tenancy, ensuring all communications are secure and sensitive information is not being shared via email.

Have you decided to move to Office 365?  
Currently considering it?

Here are some things you need to think about.

# YOUR MIGRATION PLAN

## WHAT SERVICES DO YOU NEED?

Do you know what version of Office 365 will fit your business requirements? Depending on the Office 365 subscription you purchase, you will have access to different tools and services.

Make sure to document your requirements and then examine the subscription options available to you:

<http://office.microsoft.com/en-ca/business/compare-all-office-365-for-business-plans-FX104051403.aspx>

Do you plan to use Office 365 for team collaboration? Do you need a place for your employees to store and share documents and other files? Do you want a way for employees to easily access email no matter where they are?

Have you implemented Exchange on premises for email? Then you might not want a version of Office 365 that includes Exchange. Or you might want to migrate your Exchange to Office 365, eliminating those hardware, software and resource costs. But what happens if you continue to use your on premises Exchange? How does that affect your Office 365 subscription?

Keep in mind that you can upgrade your plan at any time, so if you want to do a phased migration for services, the option is available.

### DID YOU KNOW?

Gartner places Office 365 with Yammer in the leaders quadrant of the 2014 Magic Quadrant for Social Software in the Workplace, noting that Yammer is becoming a social player across all Microsoft products

## WHERE ARE YOU MIGRATING FROM?

The migration plan you develop depends greatly on where your information currently resides. Do you have an on premises version of SharePoint? Is it the latest version, or something older?

Depending on the version of SharePoint on premises you use, your migration path might be relatively straightforward.

A quick note on migration tools. It doesn't have to be a manual process to migrate existing content into Office 365. There are a number of tools available to help you do it. Keep in mind where you are migrating your content from and how you want to set up your Office 365 tenancy, then take a look at the third-party tools that are available. And remember, not all tools can do everything, so be careful in your selection.



Tired of Google and ready to use more advanced productivity tools? Getting your data out of Google Apps might take a bit more time and be more manual than you realize.

If you are new to these types of productivity solutions altogether and have relied solely on network drives and email, then you definitely have your work cut out for you - particularly in terms of content migration.

## PREPARE YOUR CONTENT INVENTORY

It doesn't matter where your information currently resides, one of the most important things you can do is conduct a content inventory.

If you want your move to Office 365 to be successful, then you need to develop your Information Architecture (IA) Strategy. Two of the first steps in your IA strategy are to identify what you have and where, and how content flows across your organization. Doing this is going to help you:

- ✓ Organize your content in a way that makes sense.
- ✓ Define content types, metadata and relevant tags to apply.
- ✓ Understand who needs permission to what content and what type of permission.
- ✓ Determine what content is most important, and what is no longer used.
- ✓ Identify how content is accessed.



# Compliance in Office 365

The top 10 Compliance Standards followed by Office 365



## DETERMINE WHAT TO MIGRATE & SHARE

You don't necessarily want to migrate every piece of content you have. Make a note of what's no longer used, what can be deleted and what can be archived. It will save you a lot of time.

While you are at it, make a note of what content you want to be able to share with external people. This will help you plan your new content model and SharePoint team sites.

## SECURITY & PERMISSIONS

Finally, think about security and permissions. It's likely you will have content that should only be seen by the team, group or division who created and/or manages it. Within that team, you might have different permissions. Some employees may only be able to read content, others edit content.

Make sure you clearly document the permissions that need to be applied, it will affect how you organize your content.

# 6 TIPS TO PREPARE YOUR MIGRATION

## GETTING STARTED

1

### DO A CONTENT INVENTORY:

What current content will you need to move? Do you need to move all your existing content, or can you archive some so the migration isn't as extensive?

2

### OUTLINE BUSINESS PROCESSES:

Take stock of what business processes you have today that can move to Office 365. What functionality is needed, who is involved? Are these processes flexible in terms of functionality?

3

### DOCUMENT SECURITY REQUIREMENTS:

What are your security concerns? Any compliance rules you need to follow? Can they be handled?



How do you plan to manage your Office 365 tenancy? What do you require from your administrators, end users, partners? What are your expectations with regard to content, email and how they are handled?



What's your plan for training administrators and power users? End users?



Are there projects you can trial, moving them first to see how Office 365 works for you? This would allow you to slowly migrate over and improve/adapt processes if required.



## MANAGING INFORMATION, USERS



### ADOPTION PLAN

Don't set up your Office 365 tenancy and walk away. Make a plan for managing both users and information, and share it.

Like any other application you set up for your employees, you have to encourage them to use it. Too often many will stick with the tried and true methods they had before, not because they are necessarily easier, but because they know them well.

Develop an adoption plan which outlines how you are going to introduce users to Office 365 and ensure they use it effectively. Start with something as simple as an office roadshow or a webinar that takes employees through Office 365 and explains what it will be used for.

Train your users and supply them with all the tools they need to be successful (documentation, videos, team helpers, etc...).

## BACKING UP YOUR DATA

Microsoft provides a degree of on-site backup and archiving of your content. It maintains a 14 day backup of sites for disaster recovery (and it may take a day or two to recover a site upon request). In addition, deleted content is maintained in the Recycle Bin for 30 days (90 days for Admins) and is then disposed.

You will want to employ another solution for ensuring your data is backed up and protected outside of Office 365.

You might want to backup to another cloud environment, or to an on premises server. You might want to do local backups to your desktop for certain team sites, or site collections.

The key is knowing how often content will change, what content is the most critical to have local copies of, and whether you are happy with incremental backups or need full daily backups.

Customers should develop a plan to monitor, administer and backup their cloud environments. It is probably safe to say that the management approach that you have for on premises will not apply to the cloud. Another obstacle is that in many organizations, the resources responsible for local SharePoint, including hardware deployment and SQL server management, are not required for cloud-based roll outs. Instead, other skillsets such as content security and user licensing are more appropriate.

- Steven Pogrebivsky, Senior Executive, Metalogix<sup>7</sup>

## MONITORING USAGE

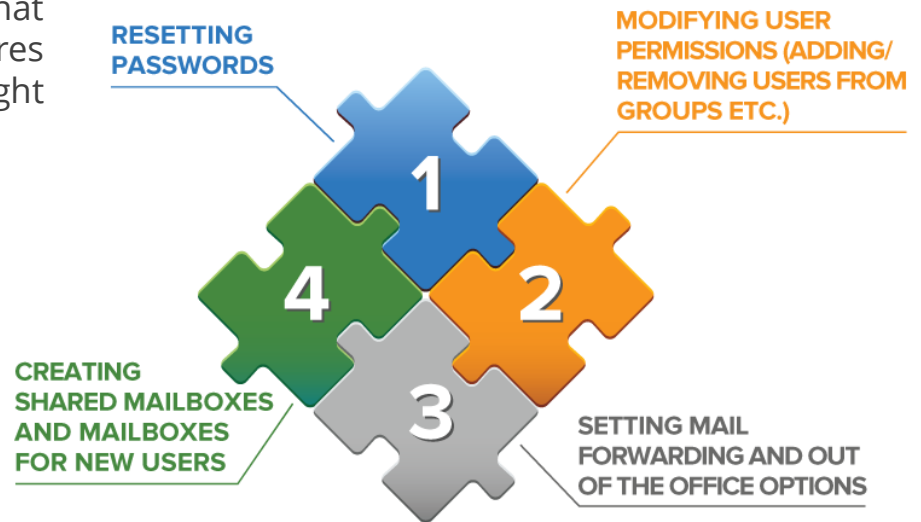
There are many things you need to consider to ensure you create an optimal Office 365 environment. Content is the driver of innovation for any organization today, so it's really important to understand what you have, where it lives and how it's being used.

There are Key Performance Indicators (KPIs) you should monitor on an on-going basis. Knowing this information helps you continue to maintain a clean environment that performs well, one which ensures content is available to the right people.

### DID YOU KNOW?

There are two ways to manage your Office 365 tenancy: the Office 365 Web Admin Center/Exchange Web Admin Center, and Remote Windows Powershell. For basic tasks, Web Admin will work fine, but for more complex tasks, especially tasks that involve multiple users, you must use Powershell, Microsoft's command line interface. In fact, some administration tasks are only available through Powershell.

## TOP TASKS FOR OFFICE 365 ADMINS



## MANAGING OFFICE 365

You also need to identify resources who will be responsible for the day-to-day management of Office 365. You will need administrators for various services such as Exchange, SharePoint and Office 365 overall. Depending on your set-up, these may be the same, or different administrators.

OneDrive poses unique challenges. There is no specific administration section to manage the use of OneDrive accounts. Ensure that you have a clear plan for monitoring the type of content stored in OneDrive accounts, and who that content is being shared with.

Clearly outline how you expect employees to use Office 365, including OneDrive, who will manage it and how you make requests. Document processes for making changes to your tenancy, including what approvals are necessary. Share this information with your employees.

**DEPENDING ON YOUR SUBSCRIPTION,  
THERE ARE MANY THINGS TO MANAGE  
WITH OFFICE 365**



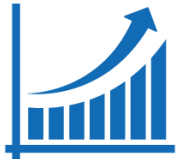
# 5 KEY PERFORMANCE INDICATORS TO HELP YOU KNOW YOUR CONTENT IN OFFICE 365



1

## TRACK HOW YOUR CONTENT IS ORGANIZED ACROSS THE COMPANY

Monitor how large your Sites and Libraries, emails and OneDrives are getting and who needs access to the content. As your content grows you may need to make changes to how your environment is organized.



2

## MEASURE CONTENT GROWTH

Measuring content growth needs to be a regular task. There are limitations on the amount of content in Lists and Libraries (some of which may be self-imposed), so consistently watching how your content is growing will help you deal with any issues before they actually become a problem. Large numbers of documents in libraries, or items in lists can also affect the quality of your search. Also monitor the size of OneDrives. A large OneDrive may be an indicator that a user is storing content that could be available in other locations, or should be moved into team sites.

3

## MONITOR DOCUMENT COUNT/SIZES

Keep track of the growth of documents in each Site/Library and OneDrive to ensure they don't reach the limits set and people start to complain. Regular monitoring of documents sizes and counts also allows you to proactively determine if you need to move a Library into a Site, split a library up or look at archiving content.



4

## MONITOR HOW CONTENT IS USED (CONTENT ACTIVITY)

Regularly measure content usage across Sites and Lists/Libraries, and OneDrives. If a particular Site is no longer used (maybe it was set up for a limited time project), then consider archiving it or deleting it altogether. You'll also need to understand what to do with the content within a OneDrive if an employee leaves the company.



5

## TRACK WHO USES CONTENT THE MOST

Knowing who is accessing content the most is important. It could be that permissions are not set up properly and you find certain people accessing content they shouldn't have access to (think Edward Snowden here). Or it could be you have organized content in such a way that a user is constantly having to move across Sites to do their work – an inefficient process. Monitoring content usage helps you find holes in your security that need to be plugged – extremely important!



# WHEN MICROSOFT CAN'T HELP

## THIRD PARTY TOOLS YOU'LL NEED

Throughout this eBook we've identified what Microsoft provides for Office 365 management out of the box. Unfortunately, Office 365 does not offer a strong set of Administrative tools for daily management of your tenancy. You will need to find one or more third party tools to help you effectively manage Office 365.

Here is guidance on selecting the right tool(s) for the job:

### 4 THINGS TO LOOK FOR

#### MIGRATION SOLUTION

1. Migrate content from files shares, Excel and other non-Microsoft locations, such as Google Apps.
2. Migrate content from an existing SharePoint implementation, copying existing content, and permissions. Also the ability to change permissions during migration.
3. Set up team sites and libraries as you move, placing content in new locations.
4. Copy the state of existing content, including metadata, permissions, created/modified properties, workflows, etc..

#### ADMINISTRATION & MANAGEMENT SOLUTION

1. A common set of reports to monitor the content in your tenancy.
2. The ability to move content from one location to another, including one piece of content at a time, or in bulk.
3. Tools to backup, archive and restore content, with options for on premises and/or cloud storage.
4. The ability to view, modify and delete permissions for users and groups across the tenancy.

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## ABOUT METALOGIX SOFTWARE

Metalogix is the premier provider of management software to move, manage and secure content for Office 365, SharePoint, OneDrive for Business, Exchange, Box, Dropbox, Amazon, Google and other enterprise content management (ECM) systems. Over 20,000 client rely on Metalogix and the industry's highest rated LIVE 24x7 support to enhance the use, performance and security of content collaboration in the cloud, on-premises and in hybrid environments.

Metalogix is a Microsoft Gold Partner in Cloud, Collaboration and Content, and Application Development, an EMC Select Partner, and a GSA provider. Our Client Service division of certified specialists is a two-time recipient of the prestigious NorthFace ScoreBoard Award for World Class Excellence in Customer Service.

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