



How Service Providers Can

Successfully Move Small Businesses to Office 365



For a Managed Service Provider (MSP), providing IT support to a small business can be challenging. Small business owners expect all the enterprise-class functionality available to large organizations but lack the resources of a dedicated IT staff to manage that IT infrastructure. Office 365 can be the perfect fit for these customers. However, completing a flawless migration can be a major challenge for resellers that serve these companies.

This paper will provide guidance to MSPs, resellers and other channel members on how to plan, execute, and support a small business migration to Office 365. The focus is going to be mainly on messaging within Office 365, but there will also be some quick pointers about where to find more resources on migrating collaboration and communication tools.

MSPs must consider that they serve as advisors to customers in these migrations and are responsible for the success of the Office 365 implementation and its adoption. Resellers that can enable customers to navigate migrations successfully can establish themselves as trusted sources of expertise and set up a lucrative stream of recurring revenue.



Find out more about SherWeb and the company's extensive partner program:
<http://www.sherweb.com/partners/resell-office-365>

Seize the Migration Opportunity

Office 365 migrations present excellent opportunities for service providers to lock in customers. The reseller that can prove itself in an advisory role in terms of both technical and business expertise can profit from one-time fees charged for the successful migration itself. What's more, if the service provider can gain a customer's confidence and demonstrate success, he can continue to run the customer's migrated platform and benefit from a recurring revenue stream.

Depending on the customer, an MSP can charge a monthly fee to keep Office 365 up and running. Or, they can charge separate fees per user, per hour or per support call. In any case, an Office 365 migration is the beginning of cost savings for the customer and increased profitability for the service provider.

Working with a migration partner can be a smart move for many resellers. Partners can better enable service providers to support their customers by supporting the service providers themselves. With a migration partner in place, MSPs can enjoy many of the same benefits they provide their customers. They can decide which projects they would like to undertake and leave migrations that are more complex to the partners. They can also reduce their workloads (and therefore their costs) per customer and per project. This will allow the reseller to assist more customers in their migrations and develop more revenue streams and strengthen relationships with more companies.

The process of moving a small business to Office 365 can be a difficult task for service providers, but they don't have to go it alone. Understanding the basic stages of migration is critical for any service provider undertaking such a project, and having a partner lined up that can support the service provider should ensure success for both the service provider and his customer.



Start with a Plan

As with any migration project, a good plan is essential to ensure the success of an Office 365 migration. While it is true that even the best plans rarely survive the project unchanged, it is still vital for a service provider to present a comprehensive plan to a customer at the outset of the project. Even if the plan does change, it will serve as a guideline throughout the migration process. It also provides the customer with a sense of confidence in the MSP's expertise.

An MSP should present a migration roadmap to his clients that includes the following elements:

Map users and devices. Essentially, this means taking an inventory of the types of devices present in the customer's infrastructure and deciding which devices (and therefore users) will have access to Office 365. This includes endpoints such as PCs, Macs, servers, tablets and phones.

Identify customizations and data that might not be suitable for migration. This is an opportunity to identify and clear up potential roadblocks.

Create a migration schedule. Start with a test migration with just a few users and then build out a schedule for the complete migration. It's important to maintain some flexibility to deal with obstacles identified in the test migration.

Select the proper migration type. This can include hybrid, cutover, staged and third party. We'll provide more details about migrations later in this document.

Get the customer's approval for the migration plan. Provide as much information as possible about the budget, scheduling constraints and other goals and deliverables. Ask your customer to sign off on your plan.

Some Office 365 CSP distributors (2-Tier) that offer migration services can help to provide a detailed plan or template for partners.



Get a Grip on Identity and Authentication

Some of the most important and challenging aspects for resellers to deal with at the beginning of a migration project are identity and authentication. Office 365 works with a variety of identity and authentication configurations. A service provider can host Active Directory for a customer, or the customer or the MSP can use Azure Active Directory as the source of authentication for Office 365 accounts. There are two main components worth considering for identity and authentication management: Azure AD Connect (AAD Connect) and Active Directory Federation Services.

AAD Connect

AAD Connect is a purpose-built version of Microsoft Information Manager designed to synchronize user accounts from on-premises Active Directory into Office 365. AAD Connect allows users to utilize their on-premises Active Directory account to access Office 365.

In addition to syncing users' accounts into Office 365, AAD Connect can also sync users' passwords. This feature allows users to have a "single sign-on" experience where they login to Office 365 with the same username and password they use to login to their computers at work. More advanced features of AAD Connect include:

- Group write back
- Password write back
- Attribute filtering
- Support for connecting multiple AD forests to a single Office 365 tenant

AD Federation Services

AD Federation Services is a Windows Server component that allows Office 365 users to authenticate against their own on-premises Active Directory. With ADFS, resellers can retain more control over the authentication process. ADFS uses the customer's own AD for authentication of Office 365 accounts. However, this greater control comes at the cost of having to keep these ADFS servers online for users to login to Office 365.

Since activating ADFS means the customer becomes reliant on those servers for authentication into Office 365, MSPs should deploy multiple ADFS servers for high availability. If deploying four servers (two ADFS servers and two Windows Application Proxy servers set in load balancing) is more than the service provider can maintain, hosting ADFS servers in the cloud is also an option.

It is important to ensure that the customer understands the Office 365 service. Office 365 includes some limitations that may be different from those in the customer's current platform. The Office 365 service descriptions are here: [Office 365 Service Descriptions](#)



Choose the Right Migration Method

The existing messaging system dictates the possible migration methods. Most migrations from a hosted email platform will happen in a cutover model. The cutover migration involves provisioning a customer's Office 365 tenant and user accounts, and then copying the customer's data into Exchange Online before "cutting over" messaging services to Office 365. It is also important to pay attention to the types of data that can be migrated from the original source into Office 365. The tools a reseller uses for data migration may not allow the provider to move calendar and contact items. In addition, some source messaging platforms, like Lotus Notes, include data types that do not map into Exchange Online in any way.

After considering all the other factors, the service provider must make a decision about which migration method they'll use to get existing data into Office 365. There are considerable differences about the features, functionality, and impact of various migration methods. Here, resellers can demonstrate value by acting as a trusted advisor in helping a customer choose the right migration path.

The migration methods to choose from are:

Hybrid migration

Configuring a hybrid migration can be a complex undertaking. A hybrid migration combines some on-premises resources with pure cloud resources to create an Office 365 implementation. This type of migration is very difficult to execute and MSPs with expertise in this area can provide major value to customers. Deciding what should remain on-premises and which capabilities should move into the cloud is a strategic challenge. Executing that plan can be even more difficult, given the variety of platforms and systems involved in the transition.

Staged migration

A staged migration is essentially halfway between a hybrid migration and a cutover migration. The staged migration allows for some limited co-existence features between on-premises resources and the cloud but not the full co-existence of a hybrid migration. There is an additional limitation in that the source for a staged migration needs to be Exchange Server 2003 or 2007, both of which are past mainstream support.

Cutover migration

Many smaller organizations will choose a cutover migration to migrate existing messaging data into Office 365. During a cutover migration, all users' data are copied into Office 365 and they are all pointed to Office 365 at the same time. Service providers frequently use this type of migration to move customers from a different hosted platform into Office 365. Some Office 365 distributors also offer free data migration to their partners.

Third-party migrations

MSP migrations are third party by nature, but the name of this type of migration refers to using a packaged set of tools from a vendor to move a customer to Office 365. Many Microsoft partners have developed tools to assist with migration to Office 365. Some service providers might have them as well, but others might want to look into third-party packages. Each of these partners has included different features and limitations for their solutions.

Execute the Migration with Confidence

The most important single action a service provider can take during a migration is to keep the customer informed about the progress of the project. The reseller is effectively the IT advisor for the SMB and needs to lead the customer into every step of the process. Constant and clear communication is critical. The confidence the MSP demonstrates in taking charge of a migration will trickle down to the customer.

One way for MSPs to build confidence with clients is to reassure their users that the new system is easier to use than the previous one. That means in most cases making Office 365 work with endpoint mail clients such as Outlook and

ActiveSync. The more familiar an interface is for the end user, the more comfortable the user will be.

Resellers should also be sure to check constantly with customers to make sure that budgeting and scheduling goals are in line with the original plan. If they are not, and often they won't be, the service provider needs to get customer sign-off on changes to the plan and explain the reasons for and nature of the changes as clearly as possible. Stability and predictability are critical to maintaining client confidence and ensuring the success of a migration.

Support Customers after a Migration

Successfully completing a migration to Office 365 is not the end of the process. Office 365 is a continually evolving group of services, and staying up to date with the current state of the service is critical for service providers and their clients alike.

One of the first steps the MSP should take in supporting a migration is to enhance the user experience by enabling mobile applications and adding new features in Office 365 as they become available. User comfort and productivity are among the most important metrics to follow in a migration, but they can also be difficult to quantify, especially in the early stages of a completed migration. Anything the service provider can do to improve the experience is critical, and making Office 365 as easily and readily available as possible goes a long way toward accomplishing that goal.

Whether the service provider is performing a migration to Office 365, coordinating a migration for a customer or supporting customers who have already been migrated to Office 365, the service provider needs to keep his own staff and the customer's staff aware of the latest features in Office 365. Traditionally, IT pros have had to learn a new version of on-premises software every three or four years. With Office 365, the cadence of updates is shorter, meaning that service providers need to be constantly evolving their skill sets and passing end-user tips on to customers. Resellers should absolutely be ready and willing to provide training to end users.

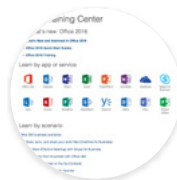
Some resources that can help keep service providers up to date include:



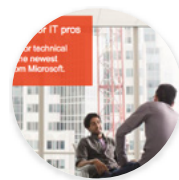
[Microsoft Virtual Academy](#)



[Office 365 Roadmap](#)



[Office 365 Training](#)



[Office Ignite Labs](#)

Find the right partner

Have you just started to resell Office 365? Maybe you're still thinking about it. In any case, you'll probably need some help. Some MSPs have a lot of experience with data migration, but they just don't have the time to offer it to their clients. So, they leave it to a trusted partner and bill for the service. It's true that partnering with the right provider will make your life easier. You can go to market much faster and increase your margins at the same time. Here are some of the things you should consider when looking for a partner program:

Customer Migration Services

Make sure your Office 365 distributor offers free migration services for all clients with no restrictions. Do they have a minimum number of seats? Do they offer free migration? Is the third-party tool included? How about the professional service? What kind of qualifications do their technicians have? Are they certified? Do they have experience migrating data to Office 365?

Ongoing Support Services

High-quality support is closely related to migration services. You have to make sure partners and end customers (if applicable) get the red carpet treatment. How do you measure the quality of your support? What's your company's score? How fast do you answer support calls? How fast do you close support requests? Do you offer any guarantees?

Partner Sales Support

If you're just starting to sell Office 365, having a dedicated Account Manager who cares about your success will be a big help for your migration process. Make sure that the sales representative who is assigned to you will be available for all interactions, not just a specific ticket or client.

Solutions Architecture Services

Ask if you can get help from a Cloud Solutions Architect. These experts know how to overcome major technical barriers. They can also accelerate the sales cycle and suggest cross-selling scenarios to partners. Again, most vendors charge for these services. These types of costs aren't always obvious, so ask the right questions.

Partner Collaterals

You're probably going to need sales and marketing material to present Office 365 to your clients and position it against other cloud solutions. Ask your partner what types of documentation they have. For example: ROI calculator, battle cards, product fact sheets and more. You might also be interested in customer-facing material in a white-label, easily editable format (like PowerPoint vs. PDF).

Team up with SherWeb

Selling Office 365 has never been so simple and profitable. Team up with SherWeb to succeed in this booming market. It's free and there's no commitment. Our goal is to simplify the cloud for our partners so they can focus on growing their business.

Start Selling Today!



Find out more about SherWeb and the company's extensive partner program:
<http://www.sherweb.com/partners/resell-office-365>

ABOUT SHERWEB

SherWeb has nearly two decades of experience simplifying the cloud for MSPs. Today, more than 4,000 partners worldwide rely on our expertise in high-volume provisioning, migration and support. SherWeb holds 2-Tier status in Microsoft's Cloud Solution Provider (CSP) program. Ultimately, this value enables SherWeb partners to go to market faster with Office 365. You own the customer relationship, control pricing and billing, and set your own margins.

Become a partner today:
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