



Your Digital Transformation Roadmap

How to create value by moving to and living in Office 365



Table of Contents

Chapter 1: What is Digital Transformation?	2
Drivers for digital transformation	3
Barriers to digital transformation	4
Chapter 2: Collaboration Across the Business	6
Cross-functional collaboration	6
Addressing Shadow IT	7
Harmonising IT requirements with business needs	8
Developing a robust roadmap	8
Chapter 3: Establishing Sustainable Data Management	10
The importance of data auditing	10
Data Auditing Best Practices: File Analysis	11
Data Auditing Best Practices: Tagging and Classifying Sensitive Data	12
Identifying other data management needs	12
Chapter 4: Managing the Move	14
Start small to test the technology	15
Consider the customer journey	15
Managing the migration	16
Chapter 5: Empower and connect users	18
Employee advocates	19
Formalised training for employees	19
Help employees do the right thing	19
Chapter 6: Sustainable information management	21
Continuing data management best practices	22
SLAs in Office 365 & thinking long term	22
Get in Touch	24
References	25



Chapter 2:

Collaboration Across the
Business

Chapter 3:

Establishing Sustainable Data
Management

Chapter 4:

Managing the Move

Chapter 5:

Empower and connect users

Chapter 6:

Sustainable information
management

Chapter 1: What is Digital Transformation?

Microsoft [defines digital transformation](#) as, “reimagining how you bring together people, data, and processes to create value for your customers and maintain a competitive advantage in a digital-first world.”

At its core, digital transformation is about harnessing the power of the cloud to deliver additional value to your customers and your internal end users.

From moving email and productivity applications to the cloud with services like Office 365, to going all-in with the full Microsoft cloud suite, businesses are leveraging the cloud to centralise and integrate information systems throughout the organisation.



Chapter 1: What is Digital Transformation?



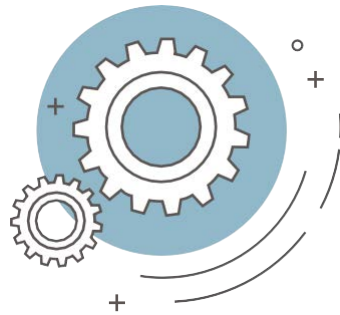
Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Drivers for digital transformation

This accelerated move towards digital transformation is caused by several factors including:

- Increased market velocity/competition
- Consumer technology trends
- The prevalence of data from the internet of things (IoT)

In a recent survey, businesses listed increased competition and expansion in new markets as main drivers of digital transformation for businesses (Solis, October 2017). The cloud enables businesses to fail fast and forward by spinning up virtual machines without having to wait for what can be lengthy infrastructure provisioning processes. Successful ideas can be scaled, and resources are paid for as they are used.

Better integrated systems can also provide a competitive advantage, allowing employees to be more responsive and better serve customers. The cloud ensures data can be available anywhere, creates one source of truth and accelerates employees' ability to collaborate.

Businesses that put off their digital transformation for too long risk being put at a competitive disadvantage. [According to Gartner](#), its anticipated up to 50 percent of business users will have moved their core collaboration and communications systems to cloud platforms. By 2021 more than 70 percent of businesses will be substantially provisioned with cloud office capabilities.

Consumer technology trends are also driving digital transformation for businesses. As consumers become savvier with mobile devices, apps and services, as well as the seamless integration that accompanies many of these tools, they expect the same experience from the companies they do business with.

Finally, digital transformation is becoming even more important as more than 8 billion "things" will be connected in 2017 worldwide, and that number will increase throughout the coming years (Chalmers, June 30, 2017). Being able to gather the data collected by these new tools, and in turn use that information to make better and faster business decisions, is spurring an increased interest in digital transformation.

Chapter 1: What is Digital Transformation?



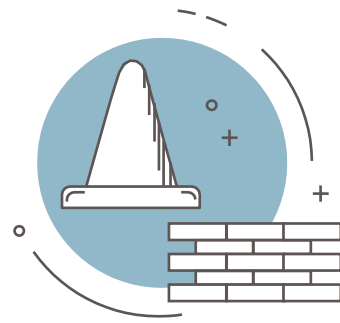
Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Barriers to digital transformation

Cybersecurity concerns: A general wariness of the reliability and security of the cloud continues to prevent some companies from embracing new technologies. In reality, the cloud provides greater defenses against cyberattacks than a business could manage on its own—much like a bank is able to use economies of scale to ensure top of the line security versus the capabilities of a single individual. Legacy systems that are no longer supported or regularly patched can pose a massive security and data management risk.

Hybrid challenges: Many companies also continue to rely on legacy systems to maintain business as usual. There are many reasons for this – sometimes budget constraints make technology infrastructure upgrades difficult, or interoperability between systems is a challenge. Many cloud service providers offerings are designed to support businesses that go “all-in” to the cloud, which is not the reality for most organisations. Without the [proper tools](#) or architecture, leveraging existing legacy technology can force employees to work in silos and makes anywhere access challenging.

Process obstacles: The final barrier organisations face with digital transformation is the process of the transformation itself. Any technology infrastructure upgrade is a big process, and sometimes it is hard to know where to begin, who should be involved, and how to break it down into manageable steps. Fortunately, there are more and more resources available to companies that are thinking about how to best approach digital transformation to enhance their business. The following chapters will show you how to overcome process obstacles to ensure sustainable success with your digital transformation. AvePoint also hosts playbooks with a diverse array of available resources on [Office 365 Groups](#) and [Teams](#) that is continually updated.

Chapter 1: What is Digital Transformation?



Chapter 2: Collaboration Across the Business

Chapter 3: Establishing Sustainable Data Management

Chapter 4: Managing the Move

Chapter 5: Empower and connect users

Chapter 6: Sustainable information management

Digital Transformation Case Study: T-Systems Engaged for Hybrid Migration

T-Systems is Deutsche Telekom's corporate customer arm. Using a global infrastructure of data centers and networks, T-Systems operates information and communication technology systems for multinational corporations and public sector institutions.

T-Systems was engaged by a global company to carry out a major SharePoint migration. The global company's executives felt it was an optimal time to not only migrate its existing SharePoint environment to SharePoint 2010, but also to migrate content from its other legacy sources to the platform. This included OpenText LiveLink, Microsoft Exchange Server Public Folders, and file shares.

The migration was no small undertaking. With 150,000 end-users, the customer had approximately 300 TB of data to migrate. With so much content being migrated into the new system and SharePoint's important role in the organisation, it was vital that the customer's data retains its full fidelity on the new platform. SharePoint's native migration abilities, however, did not ensure this would happen. "When you move to a new system, its functionalities are beneficial, but you do not want to lose the history of your data," said Parthasarathy Thandavarayan, then Migration Architect at T-Systems. "That history is very important."

In addition to SharePoint 2010, the customer also wanted to implement Microsoft Office 365 and SharePoint Online. "Utilising Microsoft's cloud services, the company aimed to standardise its environment," Bernhardt said. "Office 365 would enable the customer to drive down total cost of ownership for its technology investments."

Moving the customer onto a hybrid SharePoint deployment, with the platform hosted both on-premise and in the cloud, T-Systems required a tool to assist its efforts with both migrating to Office 365 and effectively managing the content that resided in the cloud.

T-Systems implemented [DocAve Migrator](#), which

enables organisations to move off of legacy systems and onto SharePoint 2010. In addition to its ability to enable full-fidelity content migration and migrate from all of the company's legacy platforms, T-Systems also benefitted from DocAve's mapping and reporting functions.

"The ability to map elements of a migration from their source to their destination is a major need for any SharePoint 2010 migration," Thandavarayan said. "DocAve's SQL logs have also helped us report on our progress throughout the job, both for the customer and our own internal records."

For the customer's cloud environment, T-Systems made use of DocAve for SharePoint Online. DocAve provides organisations with the most comprehensive solution for migrating enterprise content to SharePoint Online and managing hybrid SharePoint deployments.

"We're carrying out a staged migration to the cloud to reduce the number of connection paths required," Bernhardt said. "DocAve allowed us to migrate content from the source environment to the staging environment, and then directly to the cloud production environment."

To migrate to Office 365, T-Systems also needed to send the customer's content databases to Microsoft. During this period of time, it was required that the databases be set to "read only" mode. When the databases were provisioned for Office 365 and taken out of "read only" mode, T-Systems needed to move newly created content to the database swiftly and with full fidelity. "With DocAve, we could move any content the user created during the time the content database was in 'read only' mode seamlessly to SharePoint Online," Thandavarayan said.



Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business



Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Chapter 2: Collaboration Across the Business

Installing and deploying new technology is only one part of a sustainable digital transformation. Planning for a new unified system is a cross-disciplinary, user-centric effort that requires input from across the business. Digital transformation is not a one-person job or just the job of the IT department – it is an exercise in collaboration.

Cross-functional collaboration

The first step in any digital transformation project is to understand the needs and priorities of the different workstreams across the business. Usually, this means representatives from sales, human resources, research and development, marketing, information technology, operations, the C-suite and others need to form a planning committee.

This collaborative effort should take a user-centric approach to outline what employees need to get their work done effectively, from better productivity tools to anywhere access, to better data visualisation, and more. From there, it will be easier to understand what features and functionalities are required from a new digital infrastructure.

Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business



Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Addressing Shadow IT

Assessing end user needs might not just mean how employees are using official IT platforms, but how they are engaging in “shadow IT” as well.

The challenge of shadow IT has multiplied in the past five years. Companies have made it easy for one specific business unit to purchase a collaboration platform specific to their use. This can create headaches for IT administrators including:

- End user password management
- Security issues
- Content sprawl
- Training time and resources

When addressing shadow IT at your organisation, focus on what makes the specific platform work for the user. Is it...

- The ease with which they can share externally?
- The mobile interface available?
- Integration with other tools?
- Adoption among others in their team?

Once you isolate why end users prefer a specific platform, then you can align that with how a platform like Office 365 and a tool like Microsoft Teams or SharePoint Online can deliver the same or better experience. Non-essential features should be avoided as they can complicate the digital environment. Prioritising the real needs of employees is key.

Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business



Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Harmonising IT requirements with business needs

It is also important to harmonise IT requirements with the needs of the business. For example, with GDPR coming into effect, organisations that handle European citizen data will want to explore solutions to comply with the new privacy and cybersecurity regulations.

In addition, governance, records management and access rules need to be considered and customised for the business and cloud environment. Organisations should ask themselves how the cloud changes their processes for:

- Provisioning collaborative workspaces
- Managing ongoing operations
- Demonstrating compliance with external regulations
- Backing up and protecting their data
- Manage their records
- Expiration for documents and workspaces
- Removal of content after its lifecycle

Managing all of this manually can expend a lot of time and resources. Not to mention the headache of ensuring user compliance. Third party tools can help automate and enforce these governance operations. For example, AvePoint offers [Governance Automation](#), [Cloud Records](#), [Cloud Governance](#) and other solutions to address these challenges.

IT should also have an understanding of what legacy systems would need to be integrated with cloud solutions, as well as which workloads can move to the cloud versus stay on-premises – most companies don't take an all-in approach to the cloud, but instead use a hybrid combination of on-prem and cloud solutions.

Developing a robust roadmap

Digital transformation projects tend to center on one of the following categories (Solis, October 2017):

- Delivering a seamless, integrated, multi-channel customer experience
- Modernising and increasing efficiency of ecommerce and mobile platforms
- Increasing the amount of flexibility, agility and security of the business infrastructure with modern platforms

While each organisation is different, many digital transformation roadmaps follow the same 5 steps: 1) Discovery 2) Assessment 3) Pilot 4) Execution 5) Support. To accurately develop a roadmap, it's important to assess existing customisations and complex workloads that won't easily migrate to your new environment.



Digital Transformation Case Study: NTUC First Campus Delivers for End Users

With the social mission of providing quality and affordable early childhood care and education services to working families, NTUC First Campus Co-operative Limited (NFC) is a renowned and trusted early childhood care and education service provider in Singapore.

The organisation's portal, CampusNet, was established more than six years ago on SharePoint 2007. While the initial implementation of CampusNet served its purpose for years, it was due for an upgrade. "We needed a system that matched our evolving needs and is mobile-friendly," said Daniel Chua, Group Customer Service and Operations Officer at NFC. "From a user perspective, search capabilities were limited, and this made it tedious to find what was needed. The user experience on mobile devices was also lacking."

The former CampusNet was solely in English and this made it challenging for the organisation's Chinese-speaking staff to use it effectively. Some had to rely on their English-speaking colleagues to help get what they needed from the portal. "Being on-premises, upgrades to the intranet came at a cost and our custom web parts were not always compatible with new updates," said Daniel. "We also wanted to provide our staff with a better mobile experience on our intranet."

To modernise its intranet, NFC chose to embrace the cloud, specifically Office 365 – SharePoint Online. The organisation was already utilising Exchange Online, but realised a number of additional benefits Office 365 could provide. "The scalability of Office 365 would enable each user to have one terabyte (TB) of personal storage through OneDrive for Business, which would have been very expensive to provide on premises," said Daniel. "We could also benefit from Microsoft's regular upgrades to SharePoint Online, and our environment would be much more mobile-friendly."

AvePoint supported NFC at all stages of the intranet project – including requirement analysis,

solution design, UI/UX design, data migration, and implementation. "AvePoint's team was always focused on delivering what our end users needed," said Daniel. "They have been a very supportive partner throughout our Office 365 intranet upgrade. Their expertise helped us deliver the project on schedule and within budget."

In total, AvePoint's team used the company's [DocAve Software](#) to migrate 480 gigabytes (GB) of data on SharePoint 2007 directly to Office 365. In addition to moving data efficiently and outside of business hours to limit disruption, AvePoint worked with users to identify what data needed to be moved to the new system so no redundant information was carried over. "AvePoint did all the heavy lifting for our migration and made it seamless for our end users," said Daniel.

In building NFC's new intranet on Office 365, AvePoint utilised key SharePoint Online features to meet the organisation's goals:

- **Engaging Staff:** A hub for organisational updates, social media feeds with photo galleries, and a customised interface with links to the most relevant apps for each user
- **Enabling collaboration:** Shared resources across the network, project sites, and co-authoring abilities
- **Empowering Staff:** Improved search functionality, providing access to the right information at the right time

To support Chinese-speaking users, AvePoint was also able to set up a bilingual environment that would display in the user's preferred language based on his or her Active Directory profile.

After completing the project, AvePoint helped NFC roll out the new CampusNet. The immediate feedback was positive. "Our users noted that it was easy to search for the documents they needed and the availability of Chinese language support was welcomed by our Chinese teachers," said Daniel. "Based on the initial response, we are confident that we will achieve a good level of user adoption. The new CampusNet will enable us to tap on the collective wisdom of our staff members."

Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management



Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Chapter 3: Establishing Sustainable Data Management

Once an enterprise-wide roadmap has been established, it is time to take a closer look at the network infrastructure and processes that are already in place. It might help to think of moving

to a unified system as moving to a new home – it is time to sort through everything that has accumulated and make decisions on what stays and what goes.

The importance of data auditing

Auditing the company’s data before migration will ultimately save time and money, reduce the attack threat surface, and ensure the new system is secure, efficient and in compliance. Data audits are easier said than done, but they are essential for any successful migration project. Businesses create data at an exponential rate – current estimates suggest that the global datasphere will swell to a staggering 163 zetta-bytes in less than a decade (IDC, 2017). The challenge is that end users are natural data hoarders.

The average company manages 169.2 TB of data

and the average enterprise manages 347.56 TB of data, yet only 28% of that data today represents any value to the day-to-day business (IDC, Forbes). This means businesses are paying to manage and store "dark data" they don’t need. This is not a frivolous budget line item either—the average cost of data management data is 3.5% of annual revenue (IDC).

That means that the tidier businesses can keep their data management systems, the more money they can save and the less clutter there will be to wade through when employees are trying to find the information they need.

Chapter 1: What is Digital Transformation?

Chapter 2: Collaboration Across the Business

Chapter 3: Establishing Sustainable Data Management



Chapter 4: Managing the Move

Chapter 5: Empower and connect users

Chapter 6: Sustainable information management

Data Auditing Best Practices: File Analysis

Utilising file analysis can potentially reduce the costs organisations with ten terabytes or more spend on data management by up to a third. This process gives organisations the ability to discover and classify your data before you can take action and determine if it should be migrated, deleted or archived.

There are a few types of files that often comprise a large portion of unnecessary data. Identifying and addressing these “usual suspects” that are often easy targets for archiving or deletion can result in cost savings. These include:

- Documents with the keywords “Archive,” “Final,” or “Draft”
- Data duplicated between file share systems and SharePoint environment
- Unsupported data: files bigger than 10GB, non-supported files, drawings and more
- Files older than 18 months can be low value and ideal for archiving
- Newsletters

There are many more usual suspects that Certified Microsoft Partners, such as AvePoint, can help organisations identify and address to help lower their migration costs and improve their data management during their digital transformation.



Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management



Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Data Auditing Best Practices: Tagging and Classifying Sensitive Data

It is also important to understand where the business's data resides currently (that is, whether on-prem or in the cloud) and what solutions are in place to protect it. Governance, compliance and any regulatory needs should also be considered to determine what data can move to the cloud (including which type of cloud and datacenter can be used, and where). Likewise, businesses also need to identify what information needs to stay on-prem.

It is also important to evaluate the business's current cybersecurity and governance policies to determine if they are applicable and appropriate for the new cloud or hybrid environment. Now is the time to identify what changes or updates need to be made to reflect the state of the business, as well as how to communicate policy changes to employees if needed.

Data should be tagged by ownership, purpose, audience and sensitivity level. Its classification should be judged based on:

- Where should it live?
- Who should have access?
- Is it a record?
- Does it have high business impact?

Sensitive data that needs to be secured includes regulated data, such as export-controlled data; sensitive data, such as personally identifiable information (PII); or classified data, such as intellectual property. Specific examples of sensitive data include bank account numbers, tax file numbers, passport numbers and more.

Identifying other data management needs

Now is also the time to determine how to transfer customised solutions or apps from the old system to the new. In some cases, migrating custom business apps to a new platform is straightforward, but more often there is some additional coding and rebuilding required. For businesses that don't have any custom apps, now is also the time to identify if any will be needed for the digital transformation to be effective, either in offering employees the necessary functionality or to integrate disparate systems.

Finally, devices also need to be considered. As work becomes more mobile and anywhere access increases in demand, data management systems will need to be able to control access while providing users with a streamlined, consistent experience no matter where they are or what device is being used to get their work done. This means that VPN and single sign on solutions will need to be considered for a variety of devices, from smartphones to tablets, and to laptops.

Partners can be particularly useful when analysing data and network solutions. Certified Microsoft Partners can help advise on which data to move. They can also automate the process of sorting, categorising and tagging data to clean up the data that has accumulated over the years. In addition, partners can help with custom apps and extending Microsoft's out-of-the-box capabilities, such as extending governance, backup or cybersecurity policies.

Chapter 1: What is Digital Transformation?

Chapter 2: Collaboration Across the Business

Chapter 3: Establishing Sustainable Data Management



Chapter 4: Managing the Move

Chapter 5: Empower and connect users

Chapter 6: Sustainable information management

Digital Transformation Case Study:

ATEA Backs Up, Ensures GDPR Compliance in the Cloud

Atea is a Nordic organisation and the market leader in IT infrastructure for businesses and public sector organisations in Europe's Nordic and Baltic regions. The company's IT team is based in Ballerup, Denmark.

With SharePoint 2010, 2013, and Office 365 – SharePoint Online, Atea's 7,000 end users can easily manage projects and exchange information both internally and externally, on-premises and in the cloud.

To backup and restore content for its hybrid SharePoint deployment, Atea had relied on the native functionalities provided by Microsoft, yet these proved insufficient. Determined to meet the needs of the company and its end users, Atea sought out a third-party solution that could handle nuanced backup and restore tasks for its 1 terabyte (TB) SharePoint environment.

By selecting AvePoint's [DocAve Software](#) platform, Atea could prioritise increasing SharePoint flexibility for its end users. DocAve Software—the enterprise-class infrastructure management platform for SharePoint—helps organisations use SharePoint in a more sustainable, secure, and productive way. "Compared to other solutions on the market, DocAve offered more flexibility for end users and provided the migration tools that our business needed," said Henrik Arndt, Group CIO, and Anne-Marie Mikkelsen, SharePoint Business Consultant. "The service level quality to support Atea's

users dramatically increased."

More specifically, with DocAve Backup and Restore Atea can back up its intranet and workspaces to the company server more efficiently than with native functionalities. Full backups of SharePoint on premises and SharePoint Online are performed weekly, and if an item is lost or accidentally deleted, Atea can restore it within 20 minutes. Before, it would have taken 2 hours to identify and restore the item—resulting in a 60% time saving.

Ensuring data management practices are compliant was also a critical goal. The General Data Protection Regulation (GDPR) will go into effect on May 25, 2018, at which time organisations in non-compliance will face heavy fines. For the company to align with these requirements, Atea needs to track user permissions. Thankfully, with DocAve Content Manager and DocAve Report Center, Atea can move, copy, and restructure business data across SharePoint environments, as well as ensure new content is properly managed by tracking permissions. Doing so helps verify Atea's GDPR compliance.

DocAve Migrator also allowed Atea to streamline the process of moving sites and site collections between SharePoint 2010 and 2013, as well as to Office 365. "Because we have a hybrid SharePoint environment, the ability to migrate sites to another platform in a different structure with DocAve is amazing. The flexibility of the tool has been a very positive feature," said Arndt and Mikkelsen.

The coming years will hold tremendous change for the IT industry—especially GDPR in May 2018—but with DocAve, Atea is up for the challenge. The organisation will continue to take advantage of its hybrid SharePoint deployment, while using DocAve and [AvePoint Online Services](#) to go further and exceed the expectations of its 7,000 end users.

With DocAve, Atea can not only prepare for GDPR and simplify content management, but also deliver a high-quality service level to its users—something that was not possible before. "The most significant business advantage of implementing DocAve has been providing more comprehensive support, faster response times, and more flexible solutions to our end users," said Arndt and Mikkelsen.



Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move



Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management

Chapter 4: Managing the Move

Too often, businesses gloss over the collaborative planning and data auditing steps of digital transformation initiatives and put most of their focus on implementation. While implementation is important, careful preparation is what makes the implementation sustainable.

The implementation stage is highly visible as it starts to put new tools in the hands of employees and can have drastic impact on the day to day work across the organisation. It is also where problems can arise that need to be dealt with swiftly to ensure the pace of business is not interrupted as data moves from legacy systems to the new unified environment. When the time comes, implementation should be completed in two phases: an initial pilot test followed by broad deployment.

Chapter 1: What is Digital Transformation?

Chapter 2: Collaboration Across the Business

Chapter 3: Establishing Sustainable Data Management

Chapter 4: Managing the Move



Chapter 5: Empower and connect users

Chapter 6: Sustainable information management



Start small to test the technology

Before trying to transition everything to the new platform, it's best to start with a small subset of users and data in a pilot phase. This allows an opportunity to test the policies and rules agreed to during the planning phase and identify any speedbumps in the migration process itself. This is particularly true for transitioning to the cloud from an on-prem solution because cloud services might be structured differently than in-house servers, there may be some extra steps needed to ensure data successfully makes the move.

Even with careful planning, bringing disparate solutions together as a unified system can necessitate changes to the initial approach, whether it be to file structures, governance or user access. Sometimes special coding or additional services might be required to ensure a smooth transition – they're needs that can be uncovered during the initial pilot phase.

Consider the customer journey

During the pilot phase, it is important to ensure the customer experience is consistent across mobile devices as well as on the desktop.



Less than half of businesses are preparing for mobile-first customers (Solis, October 2017). This is problematic as more and more customers are using mobile devices to get work done and expect a unified experience across a variety of channels.

External customers are not the only focus, however. The pilot phase is also an opportunity to invite a small subset of internal users to try the new solution and report on their experience. Users live in the data every day and can therefore provide helpful troubleshooting feedback.

During the pilot phase it is also important to ensure your Office 365 environment is set up and prepared correctly. This is key for you organisation to maintain a healthy knowledge ecosystem where it is easy for users to find and contribute relevant content.

Make sure your information architecture is intuitive with a structured taxonomy and standardised workspaces for a positive user experience. It is also important to pre-configure some services for users to enable quick and easy access to IT resources.

Solutions such as AvePoint's [Cloud Management](#) and [Policy Enforcer](#) can help you set up your Office 365 environment, and once you have it set up, ensure that its policies are followed.

Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move



Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Managing the migration

Once the pilot phase has been completed, and issues are identified and resolved, the rest of the users and data can be transitioned to the new infrastructure. It might be best to take a phased approach to migrations – instead of moving everything at once – and do it in stages to help users get used to new interfaces or folder structures. For example, email is commonly the first workload companies move to the cloud with Exchange Online, followed by other productivity tools with Office 365.

This can be easier said than done – even with a carefully executed pilot phase – as unexpected issues and challenges can still materialise during migration to the cloud. Always expect the unexpected and be open to adjustments as flexibility is key to ensure the business is not interrupted.

Migration is another phase where an experienced partner is invaluable. Certified Microsoft Partners have completed many migrations and have seen it all when it comes to moving data to the cloud or implementing a hybrid solution. When unexpected issues occur, partners have a wealth of knowledge and expertise to draw from, and the chances of resolving problems quickly are more likely.

Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move



Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management

Digital Transformation Case Study:
Nordson Moves 400 GB to Office 365

Nordson Corporation is an American multinational corporation that designs and manufactures dispensing and fluid management equipment for adhesives, sealants, coatings, biomaterials, and other materials in a wide range of consumer, industrial, medical, and electronics end markets. The time was right for the company to begin considering a migration to SharePoint Online – Office 365.

Yet Nordson’s 400 GB of content was scattered across several locations. Executing a large-scale migration without outside support would not have been feasible. “We recognised the need to use a third-party tool to help move content to Office 365 without having to reconfigure customisations in the cloud,” said Jerry Berndobler, Senior Web Development Manager. Nordson began searching for the ideal solution or service for this critical project.

Already familiar with these AvePoint solutions, Nordson chose [Migration as a Service](#) (MaaS)—AvePoint’s white glove approach that handles migration complexity for the custom- er—to move its 400 GB environment. “Unlike other vendors, AvePoint’s MaaS includes the best in current migration technologies, and did not require us to make additional purchases,” Berndobler said. “We could rest assured that AvePoint would implement a seamless transition to Office 365, hands-free.”

Nordson first migrated Microsoft Exchange and Skype for Business to make the organisational move to the cloud more transparent for end users. In this way, users could instantly experience the benefits of Office 365.

But migrating an outdated infrastructure while providing a business justification for the cloud is not easy. While the AvePoint team needed only 4 weeks to complete the project, Nordson understood the value in taking one’s time. “With an extended timeline of 3 months, we could systematically move 400 GB and ensure a smooth transition to the cloud,” Berndobler said. “The freedom



and flexibility to move at our own pace with AvePoint MaaS was invaluable.”

In addition, implementing AvePoint MaaS meant that Nordson did not have to augment staff members to oversee migration tasks. “The AvePoint team took care of monitoring the workflow and validating that content was moved properly,” Berndobler said. “Since we did not have to allocate any staff, 240 hours of employee time was saved over the course of the project.”

With AvePoint at the helm of the company’s migration to the cloud, Nordson could concentrate on bringing new products to market to support both everyday consumers and cutting-edge technologies. Nordson’s plans for SharePoint Online are only beginning. “Thanks to AvePoint MaaS, we can take full advantage of the cloud as a content repository and a knowledge and information hub across the company,” Berndobler said.

The best part? “The ubiquitous nature of having access to resources from any device is essential,” said Berndobler. “Before, employees in the field could not access on-premises business content. Now, our SharePoint Online intranet serves as the front door for employees.”

In the next fiscal year, Nordson looks forward to evaluating AvePoint Online Services to provide self-service capabilities for users, as well as exploring tools for Microsoft Teams and Office 365 Groups governance like those found in AvePoint’s Office 365 Groups Playbook. “With Microsoft’s breakneck pace of rolling out new services for Office 365, new functionalities must be well-managed, usable, and sustainable as the business grows,” Berndobler said.

Chapter 1:
What is Digital Transformation?

Chapter 2:

Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users



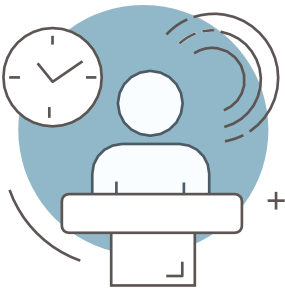
Chapter 6:
Sustainable information
management

Chapter 5: Empower and connect users

Once the new unified system has been enabled and new technology has been installed, it is important to maintain proactive involvement in the roll-out to employees to ensure the success of the business’s digital transformation. After the technology is in place, it is time to make sure end users are empowered to take advantage of the new seamless and automated working environment.

Ultimately, users do not want to be records managers – they want to do their work and feel confident that their information is being managed properly. They want solutions that work, and want to connect to data intuitively and seamlessly from any device, in any location. The digital transformation should enhance the end user experience, making sure employees can easily and efficiently create, distribute, use and manage their information confidently.

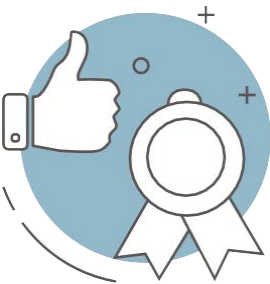




Formalised training for employees

Thanks to the pilot phase, there will be a bank of employees who have already navigated the new solution. These users can serve as the first line of support and help their colleagues master the new technology systems. When it comes to navigating the new environment or learning how to apply new features to daily tasks, employee advocates can serve as coaches for their teammates.

What’s more, training some users as early adopters can ease the burden on help desk staff, ensuring they are available to address more urgent or significant issues outside of navigating the features of the new unified solutions.



Help employees do the right thing

As with any new widespread workplace initiative, employee training sessions should be considered. Approximately 62 percent of organisations are planning to implement training programs to upskill employees, and approximately 53 percent of businesses are investing in new expertise and job creation to keep up with the changing digital world of work (Solis, October 2017).

However, even with a robust training program, users won’t remember every policy. This is where solutions like AvePoint’s [Cloud Governance](#) can help your employees stay in compliance. Solutions like [GroupHub](#) can also make previously created Office 365 Groups more visible, preventing sprawl and helping users make smarter provisioning choices.

Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users



Chapter 6:
Sustainable information
management

Digital Transformation Case Study:
Sysmex Secures Office 365 Environ-
ment, Reduces IT Burden

Sysmex is a healthcare company that aims to contribute to healthy living and the overall advancement of medical care. Located in Kobe, Japan, Sysmex develops, manufactures, sells, imports, and exports clinical diagnosis machines, test reagents, and relevant software. Since its founding in 1968, it has expanded its business to over 190 countries.

Sysmex decided to migrate its environment to Office 365 - SharePoint Online. “We’ve worked on using the latest cloud technology to reform our workstyle. By migrating to SharePoint Online, we could utilise latest features such as mobile phone access and operating 24 hours a day, 365 days a year,” said Mr. Yuji Ohnishi of the Information Solution Department at Sysmex Corporation.

The organisation also needed a way for end users to have immediate access to essential content and be able to share this information securely. “The need for an information sharing system, which is critical for external collaboration, increased over time. As a result, security became our top concern,” Ohnishi said. Given these collaboration needs, Sysmex began to seek a third-party tool to support its migration to and management of Office 365 - SharePoint Online.

After researching other solutions, Sysmex chose [AvePoint Online Services](#) (AOS). Hosted on Microsoft Azure, AOS simplifies Office 365 administration and provides granular backup and restore as well as other capabilities for SharePoint Online, Exchange Online, and OneDrive for Business.

The deciding factor was AvePoint’s top-notch expertise with SharePoint features. “AOS can automate Office 365 site creation via the user’s department, and each site group can control the operations of external users,” said Ohnishi. “With these features in AOS, we have increased the efficiency of our administration.”

More specifically, Sysmex has observed that the automation, granular recovery, and site access analysis features of AOS have improved the speed of IT tasks. “While out-of-the-box SharePoint can only recover data at the site level, AOS can recover data at smaller levels of granularity,” Ohnishi said.

As part of the healthcare industry, Sysmex must comply with strict privacy and information security regulations. The organisation relies on AOS—especially audit log archive, access permission export, and data backup—to ensure it can quickly respond to audits. “We can use the filter in AOS to search and export results as an audit report, which saves time,” said Ohnishi. “Through the implementation of Cloud Backup, a module of AOS, administration is more efficient and automatic.”

Cloud Backup is an extensible governance strategy that empowers users, is easy to maintain, and scales as an organisation’s Office 365 deployment grows. With GAO, Sysmex can configure governance settings according to internal rules so that end users can only create site collections with prior approval. “Since we can set specific access rules for units, sites, and site collections, the governance of our information environment can be easily maintained,” Ohnishi said.

Sysmex uses the AOS external invitation feature to share content via Office 365 with external partners, as well as manage this shared information. “Since it’s necessary to manage permissions in case improper information is disclosed, we were worried about creating additional work for our IT department,” Ohnishi said. “With AOS and Cloud Backup, we save time and ensure we remain compliant and secure.”

What’s more, everyday to-do items like site collection clearances and permission recertifications can be completed automatically with Cloud Backup. “By automating routine yet time-intensive tasks, we have dramatically reduced the burden on our IT department,” Ohnishi said.

To maximise its Office 365 deployment, constructing an environment for secure internal and external collaboration while saving administration time and effort were Sysmex’s top goals. With AvePoint Online Services and Cloud Backup, Sysmex can leverage granular backup, automation, and other features to achieve these goals.

Looking ahead, Sysmex plans to implement the multiple features of Cloud Backup in addition to other AOS modules. “Cloud Backup has all the features we need to reduce the IT administration burden,” said Ohnishi. “The capabilities of Cloud Backup and AOS are amazingly beneficial for our business.”

Chapter 1:
What is Digital Transformation?

Chapter 2:

Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Chapter 6: Sustainable information management

Your digital transformation is nearly complete at this phase. You've carefully planned, taken stock of your organisation's data, completed the migration and users are now comfortable with the new unified systems.

But this isn't the end of digital transformation.

Businesses need to actively manage their digitised environments to maintain usefulness for employees and customers, and for the business. Going forward, the strategy will likely turn into one focused on digital evolution, rather than transformation.





Continuing data management best practices

Organisations that have analysed and tagged data for a migration should be in the habit of routinely auditing and evaluating data accumulations. Ensure governance policies remove outdated files, information and Groups from the system.

Within Office 365 there is no easy, automated way to proactively monitor a Group through its lifecycle from creation to end-of-life. Without proactive governance solutions, your environment can quickly become overwhelmed by outdated, useless data. This can make it harder for your users to access the information they need and can even pose security risks.

Likewise, monitor archiving and backup policies to make sure data is stored for the right amount of time, and work with your storage provider if changes are needed in the future.

Without active data management, IT systems can easily turn into a content dump, where duplication and information loss could become serious issues again.

SLAs in Office 365 & thinking long term

Organisations also need to plan for the lifecycle of their solution, and how systems might be updated or supplemented in the future. Consider how Service Level Agreements (SLAs) may need to adjust in the future and choose a Certified Microsoft Partner that is committed to managing the solution throughout the lifecycle of the product. The right partner will be keenly aware of your unique business needs, and therefore can advise on important updates or assist with changes if necessary.

For example, the set retention period for backups of email, SharePoint and OneDrive in Office 365 is 30 days. Consider a partner solution if your organisation needs:

- A longer retention period
- To restore individual emails or SharePoint, OneDrive documents in place or out-of-place
- To set permission and configuration policies on SharePoint and OneDrive



Chapter 1:
What is Digital Transformation?

Chapter 2:
Collaboration Across the
Business

Chapter 3:
Establishing Sustainable Data
Management

Chapter 4:
Managing the Move

Chapter 5:
Empower and connect users

Chapter 6:
Sustainable information
management



Digital Transformation Case Study: Davanti Restores Office 365 Content in Less Than 30 Minutes

Davanti Consulting is a New Zealand-based business and technology consultancy with deep expertise in customer engagement, cloud architecture, salesforce.com and mobility.

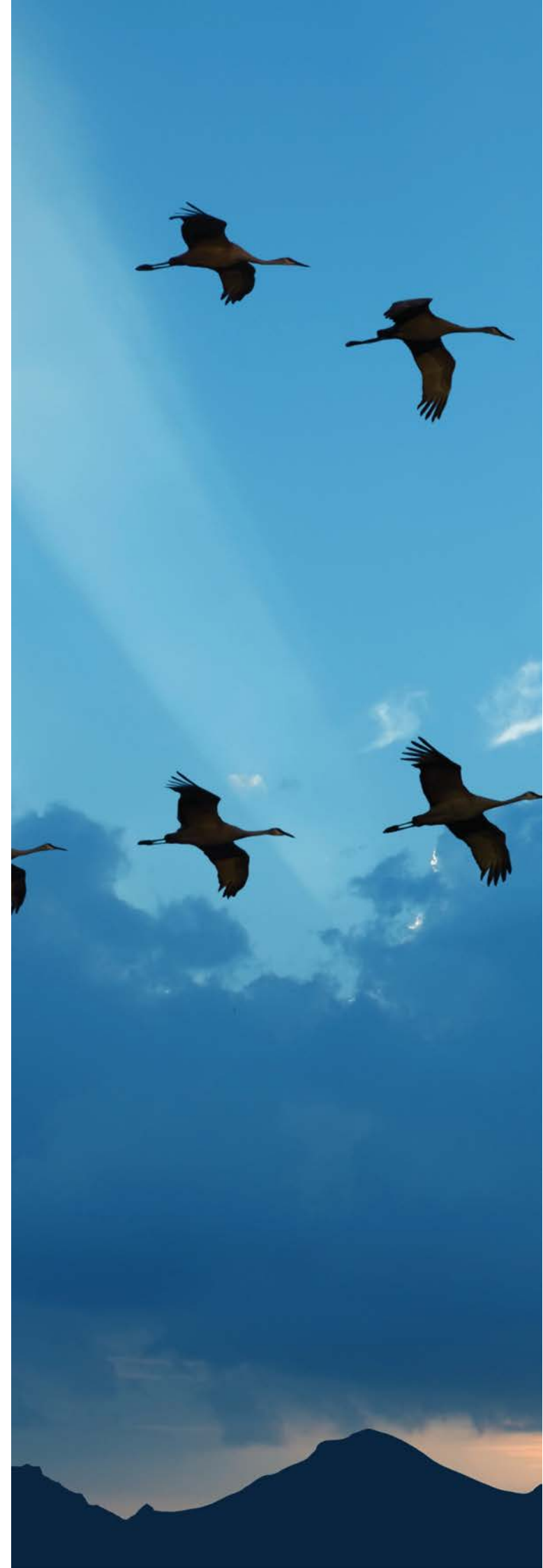
Davanti chose to migrate from Telecom New Zealand's technology stack to Office 365 due to its users' and clients' familiarity with Office applications as well as the ability to access Exchange and SharePoint Online.

According to a Senior Business Manager at Davanti, "From the outset, I knew that cloud services do not necessarily guarantee disaster recovery and business continuity. While Microsoft does a fantastic job at making sure systems are up and available, if we lost content or if data was corrupted, it could be difficult to get it back through Microsoft's service level agreements for data recovery."

Davanti set up weekly incremental backups using AvePoint Online Services' for SharePoint Online content as well as daily backups for Exchange Online shared mailboxes. Automated backups were set up and running within half an hour.

Davanti was also able to utilise AvePoint [Cloud Backup](#) granular content recovery capabilities without having to roll back the entire environment and interrupt business operations. This became critical when an office coordinator accidentally deleted an entire Exchange Online shared mailbox.

Davanti's senior business manager was able to save the day and leverage AvePoint Cloud Backup to restore the entire mailbox within a half hour.



Get in Touch!

If your organisation is considering a digital transformation, please contact us



AvePoint Australia



Tel.: +61 (0) 3 8535 3200



E-Mail: AU_Sales@avepoint.com

Demo or trial AvePoint cloud migration solutions:

- <https://www.avepoint.com/au/office-365-and-sharepoint-migration/>

Demo or trial AvePoint cloud governance solutions:

- <https://www.avepoint.com/au/solutions/data-governance/>

Request a free pre-migration consultation from our migration services experts:

- <https://www.avepoint.com/au/migration-services>



References

Chalmers, D. (June 30, 2017). Getting the Intelligent Edge. Raconteur.

IDC. (2017). Data Age 2025: The Evolution of Data Through 2025. Seagate, <https://www.seagate.com/files/www-content/our-story/trends/-files/data-age-2025-infographic-2017.pdf>.

Solis, B. (October 2017). The 2017 State of Digital Transformation 2017. Altimeter.

Woollacott, E. (June 30, 2017). Design Security In and Keep Hackers Out. Raconteur.