



ADAPTIVE • RESPONSIVE • STRATEGIC

7 Steps to the Perfect Office 365 Migration

Overview

In this guide we will examine what Office 365 is and the process of migrating to Office 365 from your existing email platform. We'll cover:

- What Office 365 is
- Why you should consider making a switch to Office 365
- Your Office 365 Subscription Options
- The 7 steps to a successful migration
- How Agile IT can help

What is Office 365?

Office 365 is a subscription based plan that provides access to Office applications such as Word, PowerPoint, Excel, etc. in the cloud. Most of the Office 365 plans include a desktop version of the newest Office applications that you can install on multiple computers and devices to include laptops, PCs, Macs, Android tablets and phones, and iPads and iPhones.

With Office 365 everything is stored on the Cloud. The Cloud is simply a web-based computing service that is hosted externally to your organization. When you use a Cloud-based service, your IT infrastructure is no longer on-premises and is maintained by host rather than residing on a physical server that you are responsible to maintain. With Office 365, Microsoft manages the software and storage on their servers. With this Cloud-based service you can access your data anywhere you have internet connectivity with your PC, tablet, smartphone, or other mobile device.

Office 365 is an excellent option for businesses, maintaining compatibility with the desktop versions of Office 2007, Office 2010, Office 2008 for Mac, and Office 2011 for Mac. And the plans that include desktop versions of Office suite programs have another advantage – they are automatically kept up to date. You will need internet access to install and activate Office 365 plans and to manage your account. You also need an internet connection to access Office 365 Cloud services which include email, IT management, and conferencing. If you have a desktop version of Office you can work offline and the next time you connect, your progress will be automatically synced so you will always have the latest version of every document. When you have Office 365, your desktop version is also kept up to date when you are online.



Office 365 is available for several mobile devices including Android and iPad. Office Mobile comes preinstalled on the Windows 8 Phone and certain models of the iPhone and Android. Office Mobile provides excellent content viewing and quick content editing. Office Mobile helps you manage your content to ensure your formatting is correct so the documents you work on while on the go will appear just as they would if you created them on your desktop.

Why should you consider making the switch to Office 365?

There are several reasons for switching to Office 365. The subscription-based suite of Office products boosts business productivity. Office 365 offers Microsoft's more popular components such as Access, Publisher, PowerPoint, Word, Outlook, SharePoint, Excel, and others. Office 365 offers automatic updates, security, and ease of use between mobile devices and desktops that no other suite of apps comes close to achieving. In addition, Office 365 offers the following benefits:

1. Scalability

Office 365 is a subscription based plan that provides Office 365 is scalable to fit your business needs. Small-to enterprise-sized companies can connect tens of thousands of users with Business and Enterprise plans that best fit their business size.

2. Accessibility

One of the best advantages to Office 365 is that it is Cloud-based – you can access the apps anywhere you have an internet connection. This enables greater productivity and flexibility for any workforce. If you are working offline on a document it will be uploaded and synced with your Cloud storage automatically the next time your device is online so you will always have the latest version.

Another benefit to this accessibility is that you don't have to download any of the Office apps as they are all available via web apps. You can use any browser you prefer, including Firefox and Chrome. This works well for companies that have a "bring your own device" policy, as Office 365 can be registered for up to five devices per subscription.

3. Administration

Office 365 is very easy to administer since it operates through a web-based Admin console. This console includes a dashboard and drop down tools that enable system administrators to create an experience for all users that is customized to fit company needs. The console makes life easy for your admins to monitor service, get support, and change settings when they need to.

On the main admin center screen, administrators can setup users, groups, and domains as well as links to other areas to access other admin tools and support. The dashboard also has a service overview that enables administrators to monitor service health which shows any issues with Exchange, the Office 365 Portal, Office Subscription, Rights Management Service, and other services. Having everything you need in one web based dashboard avoids complicated administration for Office 365.

4. Add-ons

With Office 365 you can add extra components through the administration console by purchasing additional services. For example, you can add online versions of Visio Pro, Project Pro, Project Lite, and Dynamics CRM, just to name a few. Once you purchase these you can distribute the additional licenses only to those users who need them.

5. Maintenance and updates

Rather than hiring an administrator or department to manage your on-premises Exchange and SharePoint servers, and Skype for Business infrastructure, you can do these yourself. Since Office 365 is Cloud-based, Microsoft takes the responsibility for managing updates and maintaining any patches. These updates happen behind the scenes so you don't have to worry about it. If a server goes down, Microsoft takes care of it. Office 365 provides all the benefits of Office without the hassle of maintaining it.

6. Price

While another section covers specific cost options for Office 365, it is noteworthy that Office 365's subscription plans are excellent for businesses of all sizes. Small to Enterprise businesses will find it cost effective to pay for a monthly plan. When you factor in the free maintenance and hassle-free updates as previously mentioned, you save a lot of overhead costs from having to do that yourself. Office 365 is a great long term solution as you will always have the latest version available with the most accessibility to everything saved in the Cloud.

Mobile First, Cloud First

Business Anywhere on Any Device

Office 365 Subscription Options



Business Premium

\$12.50
per user per month

OFFICE

- Word, PowerPoint, Excel, Outlook, OneNote, Publisher
- iPad, Windows RT & smartphone apps
- Office Online

STANDARD SERVICES

- 1TB cloud storage (OneDrive for Business)
- Email, calendar (Exchange)
- Online meetings, IM (Lync)
- Team sites, internal portals (SharePoint)
- Enterprise social (Yammer)
- Content discovery and search (Delve)

ADVANCED SERVICES

- Active Directory integration

Enterprise E3

\$20.00
per user per month

OFFICE

- Word, PowerPoint, Excel, Outlook, OneNote, Publisher
- iPad, Windows RT & smartphone apps
- Office Online
- Access

STANDARD SERVICES

- 1TB cloud storage (OneDrive for Business)
- Email, calendar (Exchange)
- Online meetings, IM (Lync)
- Team sites, internal portals (SharePoint)
- Enterprise social (Yammer)
- Content discovery and search (Delve)

ADVANCED SERVICES

- Active Directory integration
- Licensed for hybrid deployment
- Support for shared computer activation
- Video content management
- Compliance – Archiving, eDiscovery, mailbox hold
- Information protection – message encryption, RMS, DLP

Office 365 Subscription Options

Office 365 has three main subscription options for business: Business, Business Essentials, and Business Premium. Office 365 also has three Enterprise level plans for large enterprise-sized organizations. In this section of the guide we will examine each of the plans and which one may be the best fit for your business.

Business Essentials

Business Essentials is a stripped down, bare bones plan that costs \$5 per user per month with an annual commitment. This plan includes email with a 50GB mailbox, 1 TB of file storage and sharing, HD video conferencing, and Office Online. This plan does not enable you to install full Office versions of Word, Excel, PowerPoint, Outlook, Publisher, or OneNote. You cannot install Office on tablets or phones with this plan. While you cannot download and install the apps you can use them online through any web browser.

The Business Essentials plan also includes calendars through Outlook that you can access from a desktop or web browser. You can send emails with attachments up to 25MB. You can also customize emails to include images. You can use your own domain name with your Office 365 email account to maintain your professional status.

Business Essentials allows you to participate in online meetings to make teamwork easy with multi-party HD video conferencing. You can keep everyone together and share meeting notes. You can also share real time notes with one-click screen sharing. Through this real time collaboration you can also send instant messages and connect with Skype users.

Business

Office 365 Business is the only plan that doesn't include email, however, you can install the full suite of Office on your desktop on a PC or Mac. You can also install Office apps on tablets and mobile phones. This plan is \$8.25 per user per month with an annual commitment. You receive 1 TB of file storage and sharing, just like the Business Essentials plan.

You can enjoy the latest versions of Publisher, Word, Excel, PowerPoint, Outlook, and OneNote. You can use a keyboard, pen, or touchscreen to navigate through your files. In Excel you can easily format your workbooks with tools that will recognize patterns and auto-complete data when necessary.

You get all the same benefits with Business as you do with Business Essentials, in addition to other features. You can experience Office on Windows tablets, iPad, and Android tablets. Each user can install Office on 5 PCs, Macs, or tablets and phones. In addition to this you can rest assured that your data is secure on mobile devices through built-in security and a set of tools to manage access to data on phones and tablets. If desired, you can also apply specific security policies on devices to ensure your data is synced and only accessible on authorized phones and tablets. You can also wipe data remotely if necessary for employees that no longer work for the company or if the device is lost or stolen.

Business Premium

Office 365 Business Premium offers all the bells and whistles for \$12.50 per user per month. This plan comes with a 50GB mailbox, 1 TB file storage and sharing, HD video conferencing, and full versions of Office you can download on your PC, Mac, tablets, and phones. You have access to unlimited online meetings, IM, HD video conferencing, and Skype for Business. You also get a corporate social network setup to help teams collaborate across multiple departments, locations, and business apps.

Your corporate social network is established through Yammer, a business collaboration tool designed to enable your employees to connect with each other and share information. Yammer works across project teams and allows you to find and switch between project groups to help you keep track of the latest groups, based on interests and interactions.

The file and folder structure helps to keep projects coordinated. Office 365 provides multiple ways in which everyone can access the files they need quickly. You can build a team library and create a team site to help keep project emails and shared documents in one place with a project-specific mailbox. The team site gives you control access to your team site with automatic policies, rights protection, and archiving.

ProPlus

Office 365 ProPlus gives you the latest suite of Office products across your devices, enhanced security, and the option to deploy on-premises with your own tools or with help from the Office 365 online service. For \$12 per user per month with an annual commitment you get the latest tools for collaboration, compliance, and productivity with smooth upgrades.

ProPlus is a user-based service that enables you to access Office on up to five PCs or Macs and mobile devices. On typical Office installs you are limited to only the computers they are installed on. ProPlus offers flexible new deployment options that IT or individuals can choose from to install Office on.

If you are thinking about ProPlus vs. Professional Plus 2013, both of them offer the same app experiences. Professional Plus 2013 is a typical Office installation suite linked to the computer it is installed on whereas ProPlus is available on a monthly subscription.

Enterprise E1, E3, and E4

At \$8 to \$22 per user per month, Office 365 Enterprise packages are designed for enterprise-sized businesses. Enterprise packages offer the same features you get with other Office 365 packages with the focus on enterprise needs. With more access to document sharing and 10 GB of storage plus 500 MB of storage per user, E1, E3, and E4 allows documents to easily be shared with others both inside and outside your company with you controlling who can see and edit every file.

Mobile First, Cloud First

Business anywhere on any
device

Real-time collaboration

Built-in security

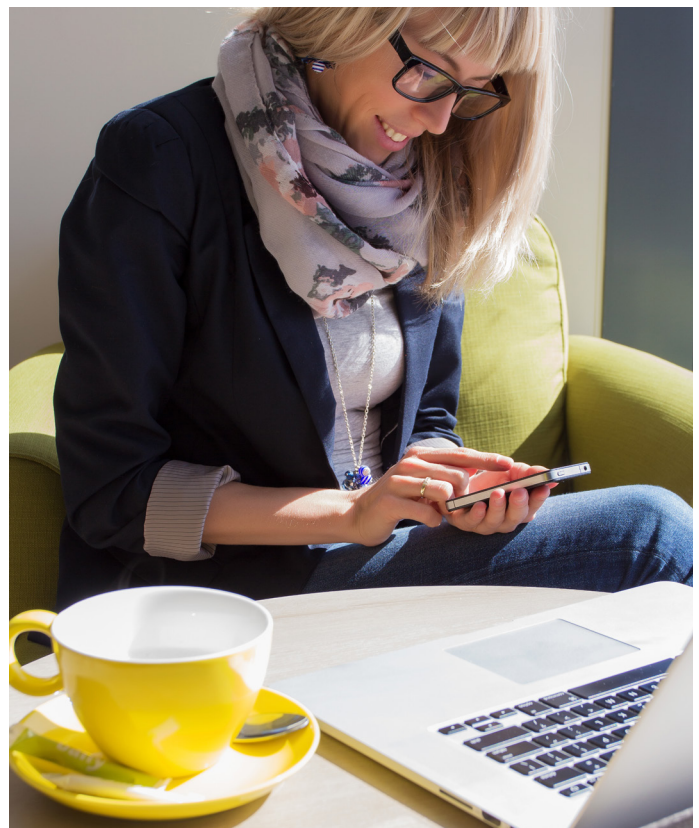
Always up to date

So which subscription option is right for me?

The right choice for your business depends on the size of your business, your need for team collaboration tools, and your budget. If you are a small to medium sized business then Office 365 Business Essentials, Business, and Business Premium are for you. Of those three, Business Premium offers the corporate social network and more team enabled features.

Having access to Yammer takes your business to the next level of collaboration. Business collaboration tools can be expensive if purchased separately and not all can be integrated as much as Yammer, which puts Business Premium ahead of the other two Business plans.

Before making a selection you should carefully examine the different features offered by each subscription package and make a determination on what your business truly needs. If all you need is a basic suite of Office 365 products, Business Essentials offers the bare bones suite that you need. If you need a little more, Business and Business Premium offer great additional features you may be interested in.



The 7 Steps to A Successful Office 365 Migration



The 7 Steps to A Successful Office 365 Migration

Once you've made the decision to migrate your OS and software requirements over to Office 365 you should consider the following as you plan for the migration.

Step 1: Pre-Planning

Ideally for large companies, planning for the migration should involve a kickoff meeting. During this kickoff meeting, you can put together a plan of the infrastructure, determine how you may want to change the user experience, mobile, Skype for Business, and develop training and communications plans.

Part of the planning phase should also include preparation and laying out the migration steps. You will have to map out how to configure AD, mailboxes, and Exchange as well as Skype for Business Online, SharePoint, and the client computers. As part of the migration planning you may want to consider how to synchronize Exchange, SharePoint content to SharePoint Online, update DNS to point to Office 365, configure the mobile environment, and validate the environment.

Step 2: Plan for Infrastructure and Exchange

As part of the planning for the migration you should consider conducting a bandwidth assessment. This assessment will determine the number of concurrent client machines connected to the network at any given time. This will help determine the network segments and connections required which in turn helps determine the bandwidth requirements.

You may also consider what on-premises hardware you will need. This will involve directory synchronization, SSO, Exchange Hybrid environment, and you may need Skype for Business Server. You may also wish to identify the current Mail-enabled applications you have, inventory the SMTP relay sources, and what third party applications you already have in use. These will all have to be compatible with the Exchange Web Services. As part of this migration you'll also have to identify migration methods and tools such as coexistence.

Step 3: Leverage Deployment Tools

Office 365 has a Deployment Readiness Tool to help you plan out your migration. This tool is useful in analyzing and gathering information on your current AD and domain settings. It helps capture your Exchange, SharePoint, End User environment, and Skype for Business settings as well as the network configurations and settings. This tool is available for download [here](#).

There is also a Microsoft Assessment and Planning Toolkit. While this tool isn't specifically for use with Office 365 it does help in your Cloud services planning. This tool includes MAPSetup.exe, Readme.htm, MAP_Sample_Documents.zip, and MAP_Training_Kit.zip that will all help you in the discovery and inventory of computers and applications. You will also be able to discover the hardware and software migration readiness assessments. More information and a link to download is available [here](#).

These planning tools are useful in helping you speed up the time it will take you for environment discovery. Also note that you should consider how much bandwidth is typically used for video conferencing, and remember that even though moving to the Cloud may reduce the amount of on-premises hardware, you may need to replace existing hardware that is not compatible with Office 365.

Step 4: Plan for Sharepoint

SharePoint Online is a cloud-based service that comes with Office 365 for Business. This service helps companies share and collaborate with their partners, associates, and customers. One of the main benefits of using SharePoint Online is that you have access to documents and sites internally from the office, at home, or on a mobile device. Before connecting to SharePoint Online there are some things you need to plan to manage through the Administration Center. You will have to consider global site collection settings, Internet, Intranet, and Extranet settings, user profiles, MySites, and more.

You should also plan for sites and managing users. You will have to set your site permissions, features, collections, and the overall look of the site while avoiding complex customization. In addition, you should also plan the content of your SharePoint sites such as metadata, types, navigation, search, and social tagging. You can click [here](#) for Microsoft's SharePoint Online Planning Guide for Office 365 for Business.

Step 5: Plan for Skype for Business (formerly Lync)

An office enhancement feature and a great return on investments is Skype for Business. Your employees will want to use Skype for Business for every meeting. Attendees can join from where ever they are at that moment, allowing for greater workplace mobility.

You will want your users to be able to connect to Skype for Business wherever they are. You can also incorporate different SIP domains within your on-premises Skype for Business.

For your connectivity to public IM, Windows Live is supported, though Yahoo is not. Hint: Public IM connectivity in Office 365 is not the same as using Skype for Business on-premises Public IM. You will have to train Mac users to ensure they get the most out of their user experience.

Step 6: Plan your end-user experience

When considering planning your end-user experience, note that there is both a web and rich user experience. The web experience includes the web browsers users choose such as IE, Mozilla, and Chrome. The rich end-user experience are your various Microsoft Office versions such as 2010, 2007 SP2, 2008 for Mac, Office Web Apps, etc.

When planning your user experience please remember that any new version of MS Office will generate a certain volume of help desk calls to be sure your help desk is ready. You can use the Productivity Hub to train your users on how they can get the most out of Office 365. Also note that Windows Intune can help you with your Office 365 distribution if you don't already have a method.

Step 7: Migrate

When planning for the migration of Office 365 you should remember to plan, prepare, and then migrate. Each of these steps involves sub-steps to help ensure you are ready to make the change. To migrate,, Microsoft has published a deployment planning checklist and offers support in the deployment of Office 365 in the link [here](#).





Why you should use Agile IT for your migration

Agile IT is an excellent partner for your Office 365 migration. With over a quarter million Enterprise Cloud migrations with 100% success, Agile IT is one of only 10 partners in the US with 12 Microsoft Gold Competencies and has won the Microsoft Cloud Partner of the Year for the last four years. You can connect with Agile IT by clicking [here](#).



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250,000
users
MIGRATED
in more
THAN 1,000
organizations

100%
deployment
success

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Partner

We make IT easy

Contact Agile IT today if you have any questions about the information in this guide, or to discover the many ways they can ensure you have a seamless migration to Office 365.

Agile IT can provide you with the best migration and maintenance plans for your business. As winner of the Microsoft Cloud Partner of the Year award from 2012 to 2015, your solution is in the best possible hands.

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