

WHITE PAPER

Part One

Managing M&A Migrations: Understanding the Environment

Merger and acquisition (M&A) scenarios are some of the most common drivers of tenant-to-tenant migrations. In these migrations, groups of users from two or more organizations are coming together as one. A related scenario is a divestiture, where a subset of users in one organization is either leaving to combine with another or becoming a standalone organization. When you delve into the differences between organizations, you realize that understanding the business environment of each organization impacts how you bring the IT environments together. There are different ways of working, organizational structure, compliance requirements and their related processes and procedures, security requirements and standards, and overall cultures. M&A migrations are far more nuanced and require a larger degree of careful planning and accounting for user impacts than a purely intra-organizational migration.

The importance of assessments

A thorough assessment is a vital step prior to any migration. In an intra-organization migration, this means assessing the Source and having discussions with stakeholders as to what the Destination environment should look like. In an M&A scenario, you need to either assess two Source environments, or in the case of an acquired organization being migrated to the acquirer's environment, assess the acquiree's Source and the acquirer's Destination. There's also a fundamental business question to be answered: which groups, business units or departments are to be merged? In the experience of BitTitan, finance, IT, and human resources are commonly combined. But often there are product organizations, support organizations, and other units that stand on their own and don't need to be merged right away—if ever.

There's rarely one individual who fully understands everything that exists in an environment, which means an assessment needs to be a collaborative effort. The undertaking can be directed by internal IT and compliance organizations, or through a services engagement with a third party that will also be tasked with executing the migration. When you use MigrationWiz to execute the migration, there are built-in discovery tools that can assist with the up-front assessment for workloads such as mailboxes, documents and Teams.

Doing an assessment provides an informed perspective on what to migrate as well as data quantity, number of users, and the number of destination licenses required. That in turn provides some insight into the cost and time required to complete the migration. Assessments are about understanding the data assets at hand and the workloads to be moved, so you can accurately plan how they will be moved into the destination in alignment with agreed upon guidelines from the migration plan.

Assessments are especially important when an organization has been on Microsoft 365 or another cloud platform for years. A comprehensive formal assessment will uncover data that is not useful, no longer relevant, and/or not necessary to keep from a compliance standpoint. But beyond the data, your assessment should extend to compliance guidelines, archiving policies, permissions, and access. An assessment can uncover users who are no longer in the organization and licenses that are being consumed but no longer actively used. So, in addition to planning for a smooth and successful migration, an assessment opens up opportunities. While it's certainly an option to migrate everything, selectively not migrating removes extraneous data. You can also declutter the environment by housing essential data in a smarter file structure. This translates to cost savings and a better user experience when everything reaches the Destination.

Assessment overview

Here are some of the fundamental items to cover as you assess the environment.

User count. Obtain a total user count and count by department or business unit; this informs the migration timeline and migration group assignment strategy, as well as the number of licenses required in the Destination.

Data quantities. Understand the quantity of data associated with each of the containers including mailboxes, SharePoint, and Teams, and how they will align with the containers on the Destination.

Documents. Assess determine how many versions of a document need to be carried over to the Destination. Examine the permissions associated with documents and their folders to evaluate whether you still have the correct permissions on the Destination. Be sure to take into account that documents may need to be accessed by users who were in separate organizations before the migration.

Folder count, hierarchy complexity, and overall item counts. Folder structure will need to be indexed and recreated on the Destination before moving items. Migration performance will be impacted by deeply nested folder structures, folders with a massive quantity of items, or both. This needs to be accounted for in the planning process.

Timeline. Initial timeline projections will need to be assessed and adjusted as a clearer picture of the migration emerges through the assessment process. BitTitan recommends a pilot migration or a test with a subset of the users to gauge what the migration performance will be, so you can adjust the timeline and expectations as necessary.

Issues to watch for

Here are some of the key organizational differences that might need to be taken into account.

End-user productivity and training. As an example, you may be merging a group of users who store documents within Teams with another set of users who use hierarchical storage within SharePoint. Or maybe one organization has customized document templates that they use regularly. Is targeted training needed before or after the migration to bring processes into sync?

Security and compliance considerations. One organization might be structured to serve large customers who have stringent security standards, requiring a certain compliance level or certification. The other organization might not have had to meet such a high standard. Do permissions need to be adjusted as part of the migration so the organization with more stringent standards will preserve their compliance posture?

Email archive policies. The acquiring organization might have an established policy for archiving emails, while the acquired organization allows users to hang onto their entire history. If the former's archiving procedures are enacted during the migration, users will be confused or upset when multiple years of email disappear. Those users will need to be informed ahead of time, or perhaps the acquiring organization's policy should be adjusted going forward to create a policy more amenable to both groups.

Enabling and fostering collaboration

Heading off issues calls for collaboration early on and throughout the migration. Even before the M&A paperwork is finalized and the deal is done, the IT organizations should be bringing together their compliance guidelines, policies, and procedures, and planning for the post-migration end state. Any sensitive Personal Identifiable Information (PII) needs to be considered and addressed. Business stakeholders can begin expressing their priorities related to the migration to minimize disruption. This will ultimately inform the migration strategy, assignment of migration groups, and timeline.

Here are a few collaboration best practices that BitTitan has identified:

Use chat to keep the migration conversations moving. Set up a migration team in one organization, and use federation to add the migration team members from the other organization(s). There are a huge number of questions and issues that come up when two organizations are planning to come together. Relying on email can bog down the conversation when all that's needed is a quick yes/no answer.

Encourage departments or business units to nominate a migration sponsor. It is to the benefit of departments and the migration team for someone to represent the interests of the users, work to ensure that key activities aren't disrupted, and assure that the end-state will be as expected. At minimum, each sponsor needs to contribute and be on-board with the timeline and data strategy.

An up-front investment in migration success

Investing in assessment upfront will pay dividends later when the migration runs, cutover happens, and users begin to experience the new environment. You need a thorough assessment to inform the migration strategy and in turn to communicate clearly, bring end-users on-board with what's going to happen, and set their expectations accordingly. Otherwise, missing items will raise a red flag, the issue will escalate, and you'll be forced to call a halt to the progress. Migration teams have learned this the hard way, as they've been forced to do a re-set and put firm plans in place in order to get a stalled migration moving again. Read the follow-on to this paper for the next steps post-assessment: developing the migration strategy, end-user communication, and migration execution.

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