



Best Practices for Successfully Navigating the Transition from SharePoint to Office 365

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Introduction

The SharePoint platform is undeniably going through a transformation. Driven by customer demand for more flexibility and options in how people consume and manage their content, Microsoft is boldly pushing forward with a “cloud-first, mobile-first” strategy across all of their platforms and brands. However, the path to the cloud can be rocky and expensive, depending on an organization’s unique business requirements, their security and compliance constraints, and how they have invested in previous SharePoint versions. Because of custom solutions, third-party tool integrations, and specialized branding, the move to the cloud could take time – and a hybrid strategy may be the best way to leverage existing infrastructure and customization investments, as well as answer any compliance and governance concerns, while taking advantage of new features in the cloud. Hybrid is rarely a simple change, or a “porting” of on premises solutions to a hosted, multi-tenant environment. It can take time, and careful consideration. For most organizations, the underlying theme of hybrid is “transition.”

Microsoft talks about “cloud first, mobile first” because the overwhelming trend is to move away from the desktop to mobile devices – smart phones, tablets, and various embedded devices. Many companies are finding out how difficult this transition can be as they begin to inventory what they have in place today, and assess what is possible through Office 365 and other dedicated cloud and mobile options. Even with more focus and scrutiny over transition plans, most organizations are unaware of all of the security and governance gaps when moving from the security of their on-prem environments to the cloud. **SharePoint Online is, in many ways, a different product than SharePoint on-prem.**

To successfully navigate a move from your existing infrastructure to the cloud, there are a number of tactical and strategic considerations. The goal of this whitepaper is to help you understand the nature of a hybrid strategy, to guide you in choosing the best planning approach for your organization, and to share some best practices for ensuring a successful transition to the cloud.

What is Hybrid?

According to a recent survey by UBS AG of CIOs in the US and Europe, the Wall Street Journal reported that more than half would move some workloads to a public cloud, but it would be a gradual process, while a third of respondents said they were moving to a public cloud as quickly as possible (July 2014, <http://on.wsj.com/1E7AY7a>).

The majority of enterprises embarking on a cloud strategy are moving toward a hybrid model because moving to a pure cloud environment may not be feasible. The complexity of their existing platform, restrictions due to data sovereignty, or concerns around security measures have many companies investigating hybrid solutions as a way to take advantage of the cost and scalability benefits of cloud while maintaining key on-premises infrastructure.

At its simplest definition, hybrid is the management of information assets between on premises and cloud infrastructures. **A hybrid strategy might employ any combination of private or public, dedicated or multi-tenant environments, and utilize software-as-a-service (SaaS), platform-as-a-service (PaaS), or infrastructure-as-a-service (IaaS) options.** While there may be some semantic arguments over the inclusion of specific integration points, such as an integrated search experience between on-prem and cloud environments, for the purpose of this paper we will refer to any information assets being shared between two or more of these options as a hybrid environment.

One of the first questions an organization must ask is whether it makes sense to maintain on-premises information assets, or to move everything to the cloud. Managed cloud services such as SharePoint Online in Office 365 can be an attractive alternative to managing and maintaining on-premises SharePoint business solutions. However, for a variety of reasons, you might want or need to deploy specific solutions in the cloud while maintaining your on-premises SharePoint farm.

For example, many enterprises must keep certain data and information systems on-premises or within their geopolitical boundaries to satisfy compliance regulations or legal policies. Some enterprises may plan to gradually move their existing SharePoint Server 2013 content and services to the cloud, using a staged migration in which SharePoint Server 2013 workloads are moved to SharePoint Online one at a time.

Microsoft defines hybrid as follows:

“At the architectural level, a SharePoint hybrid environment is created by configuring a mutual trust relationship and common identity management provider between a SharePoint Online tenant and a SharePoint Server 2013 farm. This architecture supports trusted service connections between the on-premises and cloud SharePoint farms, which can exchange data and content when requested by an authorized user. Depending on the topology and services that are configured, content in one environment can be exposed and manipulated in the other through SharePoint apps, lists and libraries, web parts, and Search applications.

Hybrid functionality in SharePoint Server 2013 and SharePoint Online in Office 365 provides several different options to extend your on-premises investment to the cloud by integrating services like search, Business Connectivity Services, and Duet Enterprise Online.”

Source: <https://technet.microsoft.com/en-us/library/dn607308.aspx>

For other organizations, there are reasons for delaying a move to the cloud. For example, many have invested time and money into complex customizations within SharePoint that drive core workloads for their business – and the time and cost of re-architecting those customizations exceeds the near-term value that the cloud provides. For others, certain SharePoint features are missing from SharePoint, or they may have geographically-dispersed teams with concerns around the performance of a cloud-based system.

Regardless of the reasons, Microsoft recognizes that not every customer situation is the same, and therefore is working hard to support a variety of hybrid options.

The Growing Need for Hybrid

“One of the challenges for SharePoint is that it is stuck between being a platform and an application. As a platform it can do a lot of things ... as an application it is limited to the UX that comes out of the box. Oftentimes customers want to utilize SharePoint as a platform on which to build a business process. It has a reputation of having a poor user experience, but that's often because the out-of-the-box UX wasn't designed to support the process. The solution is generally a third party tool, or customization of the UX that's built on top of SharePoint or Office 365.”

- Barry Jinks, Colligo CEO and Founder

One of the primary drivers of movement toward the cloud has been, historically, end user demands for more flexibility over how and where they access and manage their content, including the use of both work and personal devices almost interchangeably. For most organizations, support for mobile devices instantly moves them into a hybrid environment: key workloads are initiated from mobile or embedded devices, while business-critical systems and processes remain on-premises within traditional platforms such as SharePoint. Increasingly, end user experiences (how they accomplish their day-to-day work activities) are becoming centered on cloud and mobile devices – and many organizations are struggling to keep up, preserve governance and compliance standards, and to maintain some semblance of control. As Microsoft and the expert community began working with customers through this inevitable transition to the cloud, certain patterns have surfaced. What these patterns show is that **the key to successfully navigating the hybrid transition is to monitor and measure, be aware of what can be governed, and to be proactive about managing the end user experience.**

Microsoft has recognized the need for more flexible and out-of-the-box end user “experiences” that span their many workloads (email, group conversations, shared calendars, document sharing and editing) and has started developing what they refer to as NextGen Portals. Microsoft refers to them as experiences rather than features because an “experience” could include multiple features across several workloads. Many of these NextGen Portal experiences are being developed with hybrid scenarios in mind. In the very near-future, these solution will be able to pull data whether on-premises or in the cloud, within multi-tenant or dedicated environments, providing an increasing number of options for organizations looking for ways to keep their employees engaged and productive while also maintaining governance and compliance rules.

In a recent conversation with Mark Kashman, a Senior Product Marketing Manager on the Office 365 team at Microsoft, he shed some light on how Microsoft is thinking about hybrid as they develop the next set of NextGen Portal offerings:

“We are reviewing both how we best enable hybrid and continuously ask, what does a NextGen Portal look like in the server box? Does it have UI that depends on cloud-delivered/hosted services with smart hooks for authentication, security and experience? Or is it fully contained within the server, bound within the firewall on all sides?”

We don't have the exact answers - yet. We do believe in the power of the cloud, and fully understand the realities of on-premises deployment choices. And if you consider that the new, ready-to-go Office 365 experiences take great dependency, with huge benefits, on integrating cloud services like Delve and the Office Graph, Yammer and Azure Media Services, you'll then see why we are starting the way we are, and take note on where this may lead.”

- Mark Kashman, Sr. Product Marketing Manager, Microsoft Office 365

Recognizing the growing need for flexibility in how SharePoint (and other Office 365 features) accesses data, Microsoft has made hybrid a key tenant of the SharePoint Server 2016 release, and is developing content and solutions based on customer and partner feedback.

Establishing Management Standards

During his vision keynote at the 2014 World Partner Conference (#WPC14) in Washington DC, Microsoft CEO Satya Nadella shared how the company is moving away from their "devices and services" messaging of the past, and instead realigning their product and sales strategies around a "platform and



productivity" message. With Microsoft's historical support for older infrastructure investments made by their customers, and with this new messaging being driven from the top, it is not surprising that Office 365 and SharePoint roadmaps will increasingly focus on hybrid. Helping organizations to utilize their existing investments, coupled with a wider array of solutions and platform options, organizations will be better positioned to resolve many of their adoption and engagement issues.

The move from SharePoint on-premises to a hybrid environment – whether using SharePoint Online within the Office 365 suite, or SharePoint hosted on another public or private cloud – should be approached as if managing two separate, standalone platforms. Yes, it's still SharePoint, but the way the two systems need to be managed — and the level of access you have to the back-end — are very different. To ensure that security and compliance requirements are being met, experts recommend that all hybrid deployments begin with a detailed review of governance policies and procedures step-by-step, mapping out how each requirement was accomplished on-premises, how each will be accomplished for your cloud environment, and how common measurements will be managed between them.

Will your measurements and key performance indicators be different if your plan is to maintain a hybrid SharePoint environment? Not necessarily. Expectations from leadership will likely remain the same, even if your basic metrics and controls are captured differently between these systems. Because you are adding complexity to your environment and, essentially, doubling the systems under management, take the time to review expectations around metrics and look for common denominators. Tasks such as changing end user permissions are different. In a hybrid world, you'll need to determine how common management tasks differ, and how your team will have to adapt to properly manage two distinct systems.

Developing a governance strategy for a hybrid SharePoint environment is similar to developing one for a dedicated platform – although with a few more moving parts. It requires a firm understanding of your business requirements, knowledge of your legal and regulatory constraints, and a solid change management method in place.

Best Practices for Successfully Navigating the Transition

Best practices are rarely one-size-fits-all and must be adapted to the nuances of your business – however, there is much that can be learned from the shared experiences of the community. While there are many paths to the cloud, there are a number of things your organization can do to better prepare for the transition to a hybrid SharePoint environment:

- **Make the user experience your top priority.** Most organizations initially consider moving to the cloud, whether in whole or in part, because of business drivers – such as to reduce infrastructure costs. However, making the move as transparent and painless to your end users can be the key to a smooth transition. For example, they shouldn't have to worry about whether the content they need to access is on-prem or in the cloud – they should simply be able to access the content they need quickly and easily. The location of the data should be seamless, and the assumption is that all security and compliance measures are being met.

Two of the most important measurements to determine whether your SharePoint environment is a success will be (1) end user adoption (are they logging into the system regularly?) and (2) engagement (once online, how long do they stay and what do they get accomplished?). If people are not spending time inside of SharePoint, rest assured there is a user experience problem.

“What is the biggest problem with the SharePoint UX? For customers, it is very simple: how much time does a user need to spend in SharePoint? Unless you are enticing users to SharePoint with viral cat videos or by making them hunt down content they need, a user's

additional time spent on SharePoint will be the best measure of increased user adoption and productivity.”

- Bradley Gendelhuys, CEO of GTconsult

As you develop your hybrid environment and determine which workloads can be moved to the cloud, give your end users a voice in the process. Get regular feedback from your business units and power users. Maintaining two SharePoint platforms can be a governance nightmare if you don't have good feedback mechanisms in place with the people who are using both platforms. Regularly check in and ask for feedback, and validate your requirements and overall progress.

“When SharePoint administrators focus on technical aspects first instead of their people needs, they usually get the iteration of a portal that doesn't get much utilization. When focus turns to people and simplifying their work for them, users start to feel more comfortable on the platform. The quick wins and small successes are what it's all about. Instead of going for the Big Launch, go for the tiny one - the one that makes the difference.

Truly understand 'your' user community needs and start providing them quick solutions that make a big impact. Once that starts happening, you'll start gaining evangelists in the user community. Once that momentum reaches a tipping point and the influencers in the user community have bought into the platform, it will spread to the rest of the organization.”

- Asif Rehmani, SharePoint MVP and Founder of VisualSP.com

- **Think in terms of mobility.** Mobility is not only about moving to a responsive web design and expecting end users to access their workloads through smart phones, but it about re-thinking the mobile experience from top to bottom, and developing apps, tools, and branding that supports mobile scenarios. Consider Microsoft's plans around NextGen Portals as an example of thinking through the entire end user experience:

Intelligent - delivering personalized, relevant information to users.

Social - integrating social interactions to fuel participation.

Mobile - making it easy to access and consume content from any device, anywhere.

Ready to go - helping end users get up and running quickly with highly functional and visually rich solutions.

If well thought out, support for mobility options can actually help meet the needs of the hybrid transition, both for end users and management teams, by blurring the lines between on-premises and the cloud.

- **Monitor and measure your success.** At a high level, you cannot claim success if you cannot measure that success. One of the primary keys to effectively navigating the hybrid transition is to monitor and measure what is happening within your environment, using those metrics to identify patterns in both end user and system behaviors. Historically, most organizations are unaware of

the usage patterns within SharePoint – they don't know *why* some teams are successful while others fail to make effective use of the platform.

SharePoint includes a number of out-of-the-box health analyzers and diagnostic reports to help administrators analyze and resolve problems, however few of these reports are consistent between on-prem and online, and none of them provide a federated (or blended) view across a hybrid environment. Many of the detailed event viewers, timer jobs, and even PowerShell capabilities available in SharePoint on-premises are simply unavailable in Office 365, requiring you to think carefully about the reports and metrics that you need to capture across a hybrid environment. Some data will need to be manually captured or entered to provide a federated view – but providing a consistent view of key metrics across all infrastructure components may be critical to measuring the overall success of your hybrid platform.

- **Continually refine your governance strategy.** Governance begins with clearly defining the business requirements (what your end users expect and need to get their work done), identifying your system constraints (legal and regulatory requirements, thresholds and performance limitations of the platform), and mapping the differences between the two. Governance is then the process of managing those gaps, and monitoring changes to your business requirements so that new risks can be quickly identified and mitigated.

Your governance strategy is an iterative process that should be adjusted and optimized based on your end user needs, your ever-changing business requirements, and the evolution of the SharePoint platform and its various capabilities. Be careful not to lose sight of why governance is there in the first place – to enable end user productivity.

- **Make your change management methodology transparent.** You have made your end users your priority, and are re-thinking key workloads in terms of how your teams are using mobile devices. You have made monitoring and measurement a key component of your governance strategy, meeting regularly to adjust your baseline of policies and procedures against the reality of how your teams are using the platform. The last step is to have a visible – and transparent – process for taking action on what you learn about your system.

For change management, there is a universal fact: the more you make end users a part of the process, the more accepting they will be of the decisions made. If it's a bumpy ride getting to the final destination, end users will understand if there is open dialog and the ability for them to voice their concerns – and know that they are being heard. Far too many companies spend their time developing what they believe to be the right governance strategy, but do not account for the continual adjustments that come with a dynamic platform such as SharePoint. Increase the complexity of the environment, such as through hybrid components, and you increase the potential for change.

Conclusion

While the goal of building out a hybrid SharePoint environment is a single, seamless system, the reality is that it means – to a large extent – maintaining two disparate systems. Your management team will expect it to be run and be managed as one system. The majority of your end users will not care where their data is stored, or whether the functionality being surfaced through their mobile device is being served locally or it is sitting on a server half way around the world.

However, your priorities remain much the same whether on-premises, in the cloud, or somewhere in between: end users want to be heard and have their expectations met. Teams want their key workloads to run within the handhelds devices they take into the field or into the boardroom. Administrators want to see a blended view of the systems they manage, with metrics and statistics that provide a consistent view

across the environment. And everyone wants to see transparent and iterative governance and change management methods.

The trend of collaboration and content management systems is undeniably moving toward the cloud; however, most organizations still need to make the most of existing infrastructure investments. Hybrid SharePoint will be around for a few years yet – at least until Microsoft can create a compelling story for the cloud, and offer complete parity with on-premises functionality but at a lower cost. Until that time, organizations need to understand the best practices for successfully deploying and managing these hybrid platforms, taking advantage of the latest cloud features and scalability while maintaining their existing infrastructure investments. By following these few suggestions, organizations will be better prepared for a hybrid world.

How Colligo Can Help You Navigate the Hybrid Transition

Third-party solutions can smooth the transition to a hybrid world for users, IT departments, and the enterprise. The Colligo Engage App Platform is designed to unite content from different sources – such as SharePoint and Office 365 – and deliver it within familiar everyday business tools like Outlook, Windows Explorer, Mac Finder, tablets and phones.

Here are 3 of the ways the Colligo Engage App platform can support your hybrid transition:

- **Engaging user experience:** Today's workforce is more demanding than ever when it comes to speed and productivity. End users don't care where their content resides but they do, however, expect it to be at their fingertips: easy to find, access, edit, and share. When an enterprise system is tough to access, users quickly find workarounds that often end up compromising corporate security.

Colligo helps organizations keep users on their sanctioned systems by driving high user adoption. The Colligo Engage App Platform securely brings together content from a variety of locations and types, and presents it to users through a "single pane of glass." By presenting only the files and documents that are relevant to users, Colligo eliminates user confusion and supports productive work on any device, no matter where content is located – on-prem, in the cloud, or on both.

- **True mobile SharePoint:** End users expect more than responsive sites that adjust to the screen size of their mobile devices. The distributed workforce wants fast access to the content they need - in the office or on the road, connected or offline.

Colligo Engage synchronizes relevant enterprise content to any mobile device to ensure productive offline and mobile access with full SharePoint/Office 365 features and the ability to file, tag, find, view and share content easily. The Colligo SmartSyncing technology is more than a simple "connection" to enterprise systems. It determines which content users require, on which devices, and caches it for offline use. Likewise, it stores modifications and synchronizes this back to the enterprise content repository with smart conflict resolution. Enterprises can embrace BYOD without sacrificing efficiency and security.

- **Central configuration and monitoring:** To track your success as you transition, the enterprise needs to understand who's using what information and how. The Microsoft Azure-powered Colligo Engage Console logs user activity on the apps and makes the data available to IT to facilitate decision-making and enforce compliance. The Console also serves as the central management and policy center for configuring and managing apps on any device.

About the Author

Christian Buckley is Managing Director, Americas for GTconsult, a consulting and managed services provider with offices in the US and South Africa that specializes in "Everything SharePoint." Over the last several years, he was instrumental in the acquisitions of two SharePoint ISVs (echoTechnology in 2010, and Axceler in 2013) and helped build some of the most recognized product brands as Chief Evangelist at Axceler and Metalogix. He previously worked at Microsoft as part of the enterprise hosted SharePoint platform team (now part of Office365), and led an engineering team in advertising operations. He is co-author of two SharePoint books, three books on IBM Rational Software configuration management and defect tracking solutions, and is currently working on a Yammer book for Apress. Christian is a recognized expert on SharePoint governance, migration and social topics, actively writing for ITUnity, CMSWire, AllM.org, TechRepublic, B2C, and Wired, and other sites. He has twice been recognized by Forbes and Forrester as a Top SharePoint Influencer.

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About Colligo

Colligo is the leading provider of data synchronization solutions for Microsoft SharePoint. The company's award-winning, unified solution suite is used by over 5,000 organizations worldwide to increase productivity, streamline collaboration, and improve compliance, by delivering a consistent, secure experience across desktop and mobile devices. Colligo is a Microsoft Gold Application Development Partner with Global 500 customers, including 4 of the top 5 global oil and gas companies, Microsoft, Siemens, Towers Watson, Bayer and the US Department of Energy.

For more information, please visit www.colligo.com.

To request a free trial, go to www.colligo.com/try.

