

WHITE PAPER

Part Two

Managing M&A Migrations: Strategy and Execution

A previous paper explored the importance of understanding the business and IT environments of all the organizations involved in a merger and acquisition (M&A) scenario. This includes a thorough assessment—an essential precursor to planning your migration strategy, which is the blueprint for moving various groups of users, departments, or business units into the Destination.

While it's possible to plow through a migration without doing such preparatory work, it's really only feasible for smaller-scale migrations. When dealing with a merger or acquisition involving mid-size and enterprise-scale organizations, thorough planning and communication is essential. Users need to know what to expect, and what is expected of them.

Migration strategy: A plan for business continuity

In addition to a plan for moving users and data, a core element of a migration strategy is avoiding disruption to the business. That is why the use of migration groups is prevalent in large migrations. A weekend of migration activity might coincide with a major product release that involves multiple departments, so that key individuals in those departments might need to be assigned to a follow-up group.

Even after all the planning is done, it's still necessary to verify that everyone in a group is ready before migrating them. A day in advance, give the business stakeholders one more chance to hold off migrating specific users because their work cannot be disrupted. Give everyone a chance to raise a red flag, and then check one last time before you execute.

The role of the BitTitan Customer Success team

The Customer Success team provides guidance to an organization in the use of the tools in MigrationWiz, specifically during configuration and testing. This front-loaded assistance sets the customer up for success so they can execute the main migration on their own.

Migration strategy development is one area where Customer Success can offer assistance and recommendations, based on experience with thousands of migrations. With a small organization, it's possible to move all the data and perform the cutover in a single weekend. But for the larger organizations that are typically involved in an M&A scenario, physics applies and the data must be moved in batches over a period of days or weeks; meanwhile, the organization needs to be able to keep working. So it's typical to seed the Destination first with historical data, then do the cutover and migrate the most recent data, which is the most dynamic and can be migrated much faster than migrating the entire data set in one pass. Assisting with migration strategy with respect specifically to what data moves and when it moves is a valuable piece of what the Customer Success team provides.

Advice on end-user communication is another area where Customer Success assistance pays dividends. Keeping end-users in the loop as to when and how their data will be moved staves off complaints and unnecessary help desk calls. There are also situations during a migration where customers will need to log off and log back in so that certain steps can be successfully completed, such as while user profiles are being swapped from the Source to the Destination. Also, some elements of the migration take time to complete; users need to be told that if they have items A, B, and C but are missing item D they should sit tight and not panic. Moreover, some items simply can't be migrated automatically due to limitations in current APIs. Let end-users know about all these issues ahead of time. The lists of unsupported migration items are well-documented in the BitTitan Help Center, but the Customer Success team is intimately familiar with them and can be a big help in planning your communication strategy.

The advantages of MigrationWiz for M&A migration

The key workloads involved in an M&A migration are usually mailboxes, personal documents, shared files, and collaboration. In the case of Microsoft 365, this typically means Outlook mailboxes, personal OneDrive files, shared files in Sharepoint or Teams, and teams and channels in Teams. Companies may also have local PST files or public mail folders. BitTitan offers several bundling options that align well with M&A migrations, with per-user pricing that makes the cost of using a migration tool predictable. Among the other advantages:

Fast, flexible setup through a graphical user interface

Configurability through Advanced Options to handle the very specific demands of an individual migration

Access to the Customer Success team for knowledge, experience and assistance in planning and configuring the migration

Extensive documentation and support — a base of knowledge developed through thousands of successful migrations

Migration speed and capacity delivered through a dynamically scaled environment

Completely SaaS-based application, with no installation required (with the exception of the DeploymentPro™ application for switching Outlook user profiles)

Highly secure environment with options for meeting the specific security requirements of the largest enterprises

Tips for using MigrationWiz in an M&A scenario

Take advantage of the features and functionality in MigrationWiz to complete a high-fidelity migration.

Document versions. You can configure MigrationWiz to selectively migrate a specific number of document versions whether stored in OneDrive, SharePoint, or Teams. In advance of the cutover, pre-migrate as many versions as you need for operational or compliance purposes. After cutover, any subsequent passes migrate any revised documents and overwrite the pre-migrated documents with the newest versions.

File and folder mapping. The mappings available within MigrationWiz allow you to move the files in the Source to a different or new location in the Destination. You can preserve the hierarchy of the acquiring organization, use the hierarchy most familiar to the majority of users, or welcome the users into the new environment with an all-new, better organized and decluttered file structure.

Permissions. MigrationWiz migrates metadata including permissions from the Source to the Destination. If users in one organization need access to files and folders that originated in the other organization, those permissions will need to be added manually after the cutover. Permissions previously granted to external users of SharePoint and OneDrive will also need to be recreated manually.

User and domain name changes. MigrationWiz will carry user permissions over to a new domain by matching based on the prefix or alias of the user name. If users will be given new prefixes or aliases in the Destination, those permissions will have to be added manually.

An example migration cadence

Broadly speaking, one strategy that works well for large migrations is:

Three weeks out: Begin pre-migrating data older than two months including older versions of files, older email, archives, and inactive Teams channels and conversations.

Immediately prior to cutover: Run one more migration pass to move the most-recent email and documents.

Post-cutover: Run one or more delta migration passes to bring over any new files, Teams channels and conversations, and finish off the mailbox migration to bring over the contacts, calendars, and newest emails.

Post-migration guidance

Allow for time post-migration to remediate items that didn't move; there will undoubtedly be some items that need to be manually reconstituted because of API limitations. Users who are new to the environment as a result of the merger or acquisition may need to have access rights verified or changed, or file or folder permissions revised so they can access key items.

Even if your communication plan was executed flawlessly and addressed every potential issue, there are always individuals who don't pay attention and need some hand-holding. There's also a tendency to think if one or two items are missing, or something doesn't look or work the way it used to, that the entire migration was botched. Those individuals need someone they can talk to, who can answer their questions and give them some reassurance and direct them to any documentation or training resources that have been created for them.

You may want to leave the Source environment available for some short period of time while you're verifying the migration or in case remediation is necessary. If there was a pattern of items that failed to migrate, having the Source environment available may help you in investigating what happened so you can remediate them as a batch rather than doing one-off remigrations. Once the stakeholders are satisfied, you can de-license the Source.

Final word

In any migration, it's well to remember that you're migrating users, not just their data. That becomes an even more important consideration in a merger or acquisition, as you're moving users into a new environment that that might be unfamiliar to them. With an automated tool like MigrationWiz executing the actual migration for you, you can focus on the careful planning and thoughtful communication that are the underpinnings of a successful migration.

Contact Us

All migrations start with MigrationWiz, a fully automated, 100% SaaS migration solution that can be accessed at anytime from anywhere. Sign up, configure, and initiate mailbox, document, personal archives, public folders, and cloud storage migration projects from a single, centralized user-interface. No special training, personnel, or additional hardware or software installation needed. One of the fastest migration engines on the market, MigrationWiz makes spinning up migration projects a breeze. An enterprise-grade solution designed to scale on-demand, MigrationWiz is easy to use, secure, and industry-tested — by SMBs and Fortune 500 companies alike.

To get started with your migration project, visit www.bittitan.com.