



The keys to successful content migration for mid-market enterprises

December 2022

A report from



CONTENTS

INTRODUCTION	3
.....	
COMMON MIGRATION CHALLENGES	4
.....	
THE OPTIMAL MIGRATION PROCESS	5
.....	
ANATOMY OF A SUCCESSFUL MIGRATION	6
.....	
CONCLUSIONS	7
.....	



Introduction

Digital content is critical to today's business operations. From electronic forms to customer records, it is hard to envisage a company that can function without easy, reliable and secure access to documentation and data. Yet this corporate lifeblood may be poorly managed in mid-market organisations. Enterprise content is held in silos and stored on obsolete systems, poorly catalogued and lacking in oversight. This can lead to a range of issues.

At the most basic level, poor documentation management can slow corporate processes and cramp efficiency. Multiple copies of documents can use up valuable data storage space and pose a problem for version control. Customer service suffers when key client documents must be submitted repeatedly because they cannot be found on company systems.

Increasingly, too, there is a danger that poorly managed document archives may fall foul of data privacy laws such as Europe's General Data Protection Regulation (GDPR), potentially exposing the business to costly and reputationally damaging compliance risks. And if content is kept on systems that are no longer supported by vendors, then there is an even greater danger of data breaches.

Maintaining good content hygiene is always important to avoid such issues, but at the present time there is a further reason to review document storage and management policies. On April 11, 2023, Microsoft will end support for SharePoint 2013, a platform that was widely adopted for enterprise content management and is still in use in many companies today.

Whether your content is on SharePoint 2013 or another system, the chances are that you may now be looking to relocate documents to Microsoft 365, either as part of a wider cloud strategy and/or to satisfy post-COVID demand for more flexible working practices. This report looks at the challenges you may face, the options available - and best way to ensure a smooth migration.



Moving content from one platform to another may not seem like a big deal. After all, digital content gets moved around all the time.

Increasingly, such transfers underpin modern business operations. Perhaps because of this, enterprise content migration projects are rarely given the priority they deserve. It is only when migration projects are attempted that the scale of the problem emerges.

One major challenge with migrations is finding out where content is stored in the first place. Content owners and users tend to have a pretty good idea of where their documents are, but that information is rarely catalogued. When someone leaves, the knowledge about their content leaves with them.

Because companies have scant information on their content, it is hard for them to measure the impact of poor content management, so migration projects tend to be seen as a necessary evil instead of an opportunity to improve business agility and competitiveness. As a

result, migrations may be hurried or underfunded, increasing the likelihood that critical content may be corrupted or lost in the process, or that the project drags out and has an adverse impact on business operations.

In a worst-case scenario, an in-house team may have to call off the migration altogether and either stick with a legacy platform, or seek external help after having committed significant effort and resources to the project. Enterprise content migrations are rather complex operations and large organisations can end up investing large sums in complex tools to enable the process. Such tools may be beyond reach for mid-market companies with limited budgets.

The question for these companies is what is the best way to migrate documents to Microsoft 365?



As companies consider how to deal with aging enterprise document management systems, they face four choices:

1

Maintain current systems

Equivalent to doing nothing, struggling to keep aging systems going when no longer supported by vendors is clearly an increasingly risky proposition, particularly when IT staff turnover can jeopardise in-house support capacity and capabilities. For this reason, it is advisable to migrate to a modern, cloud-based platform such as Microsoft 365 as quickly as possible, notwithstanding the need to plan the move carefully and with due consideration of the complexity of the process and considering the impact on associated processes and workflows.

2

Rely on a specialist third-party provider

It may seem surprising that a third party could have a better understanding of a company's content than the company itself, but the value of engaging with a migration specialist is they will be able to objectively apply best practice to migrations. This includes using the right document discovery and recovery techniques, maintaining data integrity on migration and configuring Microsoft 365 to optimise the value of content once it is hosted in the cloud. Relying on a specialist with proven expertise across a wide range of customers, systems and application areas can ensure the migration is complete, timely, reliable and cost effective.

3

Buy in specialist tools

These fully featured applications are powerful migration tools that are well suited to the needs of large, highly complex organisations, but for mid-market businesses they represent expensive options that are unlikely to be fully utilised and thus provide a poor return on investment.

4

Carry out migrations in house

This may appear to be a reasonably low-cost option and indeed might be suitable for companies with very basic content landscapes. In practice, as noted above, the complexity of enterprise content structures often only becomes apparent after a migration has begun, so that do-it-yourself projects carry a significant risk of failure because in-house teams lack resources, expertise and knowledge.



Ideally, a migration service should be tailored to the exact needs of the enterprise rather than being an off-the-shelf package. The specialist provider will effectively work with the enterprise IT team, transferring skills and knowledge as well as offering support in areas such as the handling of permissions and other complexities.

The service provider will also have experience in handling the legacy document management systems (DMSs) involved and will be able to provide additional services such as integrations, intranet builds and workflow developments. Most importantly, it should be able to provide all this with greater flexibility and lower cost than the alternatives. The specialist provider will usually undertake the following processes:

- Auditing content in file shares and legacy DMSs.
- Determining the best technical approach for extracting content from the legacy DMS.
- Analysing processes and systems dependent on current document repositories.
- Defining a migration strategy, plan and rules.
- Supporting de-duplication and housekeeping of current content.
- Migrating content according to the optimum migration strategy, using scripts and tools as required.
- Applying content classification and retention rules.
- Re-integrating and/or migrating content-dependent processes.
- Delivering end-user adoption services such as training and governance guidelines.
- Providing a full technical handover to the in-house IT team.

The benefits of this approach are that it reduces risk through best-practice migration approaches and proven tools and methods—and ensures effective and consistent use of the Microsoft 365 platform. It should also ensure key meta data is preserved and content-related processes are supported during and after migration.

The goal is to look after end users' interests during and after the transition, so there is minimal impact to operations and all the enterprise experiences is an uplift in efficiency, resilience and productivity.

The value of partnering with a third-party specialist for content migrations is borne out by the experiences of our many valued customers in the UK.

A large London borough, for example, engaged with Deltascheme to migrate its human resources and payroll documents to SharePoint Online in Office 365 because its legacy HP Trim platform was no longer supported or fit for purpose. A proof of concept helped the council understand the benefits of the migration and the changeover was managed with no impact on operations and due care for the sensitivity of the documentation.

Similarly, the London-based Competition and Markets Authority relied upon Deltascheme to migrate a complex, on-premises Microsoft SharePoint 2013 case management and intranet system to Microsoft 365.

The intranet had 54 sites, 2,500 pages and 8,000 documents and was moved along with the Authority's case management system in conjunction with an office move. To minimise

the impact to operations, the migration of each business unit's content was scheduled to coincide with the team's training sessions on the new environment.

Besides moving the content, the entire architecture was simplified to make it easier for staff to navigate, improving the usability of the material and enhancing organisational efficiency and productivity.

Examples such as these illustrate how complex content migration projects can be carried out with minimal fuss and risk, bringing new levels of flexibility and productivity to the enterprise.

If you too are facing a content migration challenge and would like to discuss migration strategies, please do contact us via sales@deltascheme.com.



Deltascheme Ltd

344-354 Gray's Inn Road
London
WC1X 8BP
United Kingdom

T: +44 1628 401 800

E: enquiries@deltascheme.com

W: www.deltascheme.com

