



# How to Successfully Migrate to SharePoint Online



# Introduction

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SharePoint Online is a powerful collaboration tool that enables teams to work together efficiently and effectively. It allows users to store their work data in the cloud, move information across environments, and receive updates automatically. With this functionality, information is available anywhere across the organisation, data is kept secure and organised for employees to perform at their best no matter their location, device or work style.

Despite the obvious benefits that come from using SharePoint Online, many organisations are still not in the cloud and struggle to migrate to a modern SharePoint environment. We see many businesses still using on-premises file shares, older out of support versions of SharePoint or an alternative intranet/ document provider. While these solutions were popular many years ago, we believe a more modern solution can bring a host of benefits to your business.

We understand that migration can be a complex and time-consuming process, with potential risks and challenges along the way, which is why we've created this guide to help you navigate your SharePoint migration journey with confidence. Whether you're a small business or large enterprise, this guide will provide you with everything you need to know to ensure your SharePoint migration is a success.

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# Where you are in your SharePoint journey

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If you're reading this guide, there's a good chance you're considering a move to SharePoint Online or at least exploring your options. While it's a no brainer for many businesses that moving to the cloud would be a superior solution for their systems, research shows that migration to SharePoint Online still has a way to go.

So where are you in your SharePoint journey? We've highlighted some common starting points for businesses and the reasons why you may want to upgrade to ensure you're getting the most effective solution for your business.

## You're using an old on-premises version of SharePoint

We know that migrating to the cloud offers the opportunity to modernise your information structures and data management processes, but what if that option didn't exist when you were starting out? You might be an early adopter of the service and moved over to SharePoint before the cloud version was available. Perhaps you inherited this set up and don't know any different, or maybe there are people in your organisation who are reluctant to change.

Whatever your reasons, we would say by sticking to the on-premises version of SharePoint you are missing out on a host of new features and functionality. For example, with SharePoint Online, users have the privilege of receiving early updates on new releases and upgrades as opposed to those using SharePoint on-premises who won't have access to new features.

This also applies to support. Did you know that if you're using SharePoint version 2013 or older, these are now out of support. Organisations who are still using older versions of the service may need to migrate to SharePoint Online to ensure continued support and access to the latest features. By not upgrading you may open yourself up to security and compliance issues.

## You're using a third-party solution

Despite SharePoint being the most well-known and widely used intranet and content management platform, there are many alternatives to SharePoint out there and you may be using one of them. While these systems aim to deliver similar benefits to SharePoint, in our experience some third-party tools can become quite costly over time as they may require additional license costs or fees.

For example, we come across businesses that have Microsoft 365/Office 365 bundles and are also paying for a third-party solution without realising that SharePoint is included in these packages. Collaboration can also be a struggle as your solution may have a dated interface and not integrate with more modern solutions like Microsoft Teams.



## You're using a file server

Traditionally, companies have used on-premises file servers to store their corporate data and you might still be using one today. While this common drive was a huge step for businesses back in the day, nowadays shared drives can hold you back.

Traditional file servers can also leave gaps in collaboration; often content gets duplicated and old versions get mistaken for the latest version, etc. There's also a risk of data loss where a file/document might have been changed or deleted and you have no way of knowing until you look for it, by which point it's too late. The hierarchical file and folder structure can make things very hard to find if you do not know where they are stored, and the search function is very limited.

Ultimately all of these factors can cause mix-ups in communication and really damage the efficiency of a company's work practices.

## Common scenarios for migration

The reasons for why you want to migrate or may be reluctant to move are one thing, but there are some scenarios that can prompt a move to SharePoint. From a company refresh to a merger or acquisition, sometimes these scenarios push you into making a change. Here are just some of the most common scenarios that you may be familiar with.



**Restructuring**



**Company refresh**



**Merger/acquisition**



**Legacy software is  
no longer supported**



**To get the benefits of  
the Microsoft 365 platform**





# The benefits of migrating to SharePoint Online

Now we have covered where you are in your SharePoint journey, let's look at some of the great benefits you could get from migrating to SharePoint Online.

## Improved User Interface

SharePoint Online is continuously evolving and one of the key improvements is the availability of modern sites. These sites follow modern design principles and look great. You don't need any design experience as you have access to pre-made templates to create beautifully designed pages with clear structures. You can also use modern components to bring many more benefits such as better search functionality and user-friendliness. See the [SharePoint Look Book](#), full of modern experiences and layouts you can build with SharePoint Online.

## Mobile responsive across devices

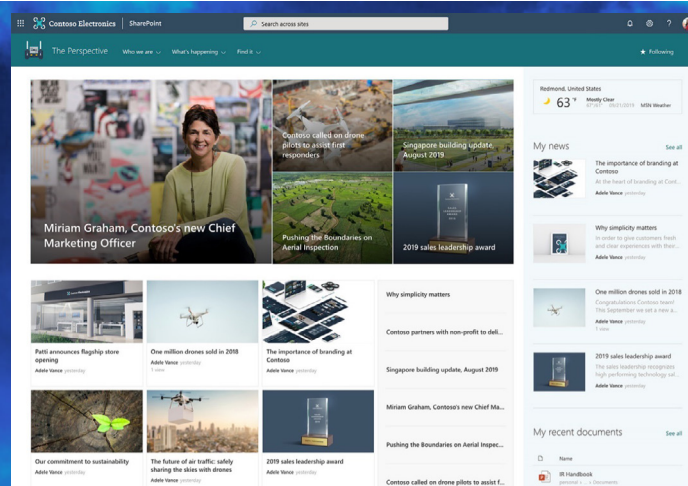
Why does it work on desktop and not on mobile? - are words you shouldn't hear with SharePoint Online. This is because they are designed to work well across desktop and mobile. Responsive design is built-in, and as an author you don't need to do anything extra to create well-designed pages that adapt to mobile screens.

This is a huge benefit, especially if you have remote workers as they can also access company information from almost any device. No matter if they're working from home, or on site, provided they have an internet connection, they'll be able to access SharePoint.

## Wide integration with Microsoft Teams

Microsoft Teams is now a critical part of how organisations communicate and collaborate with each other and if you add SharePoint to the mix the possibilities are endless. Their integration leads to easier editing and sharing of files as SharePoint is what powers document management in Teams.

For example, every Team has an associated SharePoint site, including a document library. Any files uploaded to or created in Teams are stored in the SharePoint document library. You can also embed your intranet into Teams via Microsoft Viva.







# The standout features of SharePoint Online

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The benefits of SharePoint Online come from the wide range of impressive features on the platform. Microsoft continues to improve features regularly (we're sure there will be many more by the time we publish this guide), but here are some of the standout features of SharePoint Online.

## Metadata/search

One of the major plus points for SharePoint Online is its search ability. Like Google, SharePoint indexes everything you have on your site. Essentially SharePoint tags every document and file with all the information contained in it plus tags including authors, dates etc. which are all searchable. The search is also individual to you, so it will take into account your permissions and the people you collaborate with the most, to bring up the most relevant options.

Here, metadata is what enables the search and includes data attached to any file on SharePoint, whether it's an image, document, or spreadsheet. This type of search is a huge time saver and encourages higher productivity when searching for items rather than looking through folders etc. This is the new approach recommended by Microsoft.

## Data security

Microsoft has always been big on security, and this is no different when it comes to data in SharePoint. There are several security and compliance features available to ensure your data is protected. You have document retention policies which allow you to label and tag content appropriately, this can help provide guidance on how long you are supposed to have access to certain types of documents. This also helps you manage document sprawl and meet your legal and regulatory requirements on holding information.

Sensitivity labels allow you to tag documents according to how sensitive they are and can help reduce data leakage. For example, you can control which staff members can see certain documents or add limits on documents that should not be sent internally or out with the organisation.

## SharePoint lists

Similar to a spreadsheet, table or a simple database, a SharePoint list is a collection of data displayed in rows and columns. How these differ from a spreadsheet is that they enable users to collaborate with the information in a much easier way.

As part of the security features, you're unable to copy the list and you can control who can read or edit each field, column or row. Every user also gets the ability to change the view, drill down to key information without impacting other users. For example, issue tracking, announcements or results of a form.

A good way to think about SharePoint lists is instead of storing documents you are storing an entry of data made up of multiple different columns. Often, users who maintain tracking spreadsheets can benefit from converting these to SharePoint Lists to take advantage of the functionality they offer.

Note: SharePoint Lists and Microsoft Lists are now the same thing and there is a Microsoft Lists app which means you can access your lists via a mobile app. If you create a list in Microsoft Teams, Microsoft Teams will save the list in SharePoint.





## Workflows and automation

If your business has been using older versions of SharePoint, it's likely that you've been using SharePoint workflows to automate processes at some stage. These 'classic' workflows were considered the answer to everyone's problems, that is until Power Automate was introduced.

SharePoint with Power Automate gives you a far superior tool to manage your workflows. Power Automate workflows integrate well with most of the Microsoft 365 apps required for your business operations unlike SharePoint workflows. They also offer a more fluid, seamless, and interconnected experience for SharePoint users.

## Extract information from your documents with SharePoint Syntex or AI Builder

SharePoint Syntex is the AI-powered ability for Microsoft 365 to learn and understand your documents. It allows knowledge to be extracted from a file and then automated processes can be implemented around your content. A practical example of this could be invoicing. All you do is show Syntex a few example documents and what information you're looking for now and going forward. Syntex can then analyse any new documents, identify its type and extract the relevant information from it. This can be combined with automated workflows to push that data or document to the relevant department.

With SharePoint Syntex, you can build a content understanding model, add extractors, and then automate content processing to ensure invoices are paid. You can build similar models to help you with anything from processing timesheets to managing employee contracts.

AI Builder on the other hand is the same but works better with Power Platform. For example, it can be triggered via Power Automate flows / Power Apps and allows for simpler implementation with Power Platform generally. The main difference between the two solutions is that with AI Builder you must explicitly trigger a flow, whereas Syntex sits in the background and performs its analysis.

## Microsoft Viva and SharePoint

If you've been exploring a new intranet, chances are you'll have read about Microsoft Viva. Many articles online choose to focus on SharePoint vs Viva, pitting the two solutions against each other, when the truth is Viva doesn't replace SharePoint. Instead, it becomes more accessible via Microsoft Teams, and you can access more functionality.

It's important to remember SharePoint is the building block of Microsoft Viva, especially Viva Connections. Viva Connections is all about ensuring your employees stay engaged with your company. Powered by SharePoint, it gives people a curated, company-branded experience on a custom feed of news, announcements and conversations. The personalised dashboard connects individuals to company tools and resources across the digital workplace, keeping everyone in the company engaged.

SharePoint is used by many businesses as an intranet, and various elements must work together to make it engaging, accessible and user-friendly. SharePoint is the backbone for a company's intranet, allowing elements like Teams and Viva Connections to function as an interface for employees to engage and collaborate consistently, efficiently and productively.



# 7 steps to a successful SharePoint migration

As demonstrated in this guide, a SharePoint migration is by no means an easy process. However, we've tried to simplify the key steps that should keep you right. We've narrowed down the stages into seven main steps you should follow to ensure a seamless and successful migration.



## Step 1 – Pre-migration

As you begin your journey towards a successful SharePoint migration, the first stage should focus on planning. Prepare for change and create a detailed migration plan to help you avoid potential errors and reduce downtime further along the line. The key areas you should cover are:

- › Decide your approach – big bang, staged or tooling
  - A big bang approach would require you to move everything over from your existing set up at once. When following this approach, you have a set amount of time to complete the entire transfer. This means you should anticipate downtime of live systems as the migration is happening. The main benefit of this approach is your migration will be complete in a short period of time but be aware that it can be intense and some of your resources may be offline for a period of time.
  - A staged approach would require you to move things over in phases, for example department by department. During implementation, the old system and the new are run in parallel, which eliminates downtime or operational interruptions. Processes running in real-time can keep data continuously migrating. Compared to the big bang approach, these implementations can be complex in design. However, the added complexity – if done right – usually reduces risks, rather than adding them.
  - Tooling would require using a SharePoint migration tool (SPMT), ShareGate or a manual lift and shift.
- › Engage your key business areas with workshops – don't leave anyone in the dark and ensure everyone is clued up and on the same page.



## Step 2 – Discovery

This stage is all about looking at everything you have. Here you will be collecting data that you will then use to help determine your strategy and plan for migrating. Take stock of all the content that's in the source including sites, lists and libraries, users, permissions and metadata.

The more information you have, the easier your migration will be. There are tools such as PowerShell to help you get all the information you need.





### Step 3 – Clean-up stage

Quite possibly the most dreaded stage for people is the clean-up, but to ensure an organised and tidy SharePoint environment that will be easier to adopt down the line, this stage is essential. We recommend you check your data thoroughly and remove or mark any data that's no longer valued or valuable to the business.

The more you get rid of, the less you have to carry over. We always try to encourage businesses to try at the very least to leave some stuff behind as it speeds up the process and reduces costs.



### Step 4 – Prepare your new environment

Make sure an Office 365 tenant is in place with appropriate licensing because if you don't have the right licenses, your users might not have the right experience when you move over. We recommend the enterprise licenses, depending on what you need, but there are cheaper licenses available. This stage is a good opportunity to build architecture using modern methods.



### Step 5 – Get your users ready

Do your users know why you are making the move? Ensure everyone in the business understands the reasons for migration. Using training and communicating with your end-users will help to keep them all on the same page.

During this stage it is useful to think about what you'll be offering in terms of training and support and how this will feed into reaching your long-term goals. You don't need bespoke materials for this part as Microsoft provide videos and really well supported training materials.



### Step 6 – Migrate

Now comes the part we've been working towards – the migration. Once the prep is complete, migrate the data using the tool you have chosen, giving regular updates to stakeholders and making sure users are communicated with throughout the process.



### Step 7 – Service adoption

You've done the hard part; now how do you tell people what's happening? Here are four key points you should consider:

- › Manage expectations when it comes to the migration
- › Allow time for testing and training
- › Create realistic goals and map out what success looks like - then take small steps to get there.
- › Look for resources to help with service adoption. Microsoft provide [a range of free resources](#) you can use to ensure you have all bases covered.



# Best practices for migrating to SharePoint Online

No matter what your reasons for migrating to SharePoint and OneDrive, the process can seem overwhelming. You have so much to consider: What content do you have, and where is it stored? What will you move? You also need to think about things like timing for the migration and how to communicate what's happening to the rest of the organisation.

To help, we highlight the key stages you should cover when moving towards a successful SharePoint migration, these include planning, governance and strategy and include some best practices for a successful SharePoint migration.



## Planning

- Don't just lift and shift
- Use your data
- Don't focus on custom solutions



## Governance

- Form a governance strategy
- The general structure - Hubs
- Permissions / Controlling SharePoint Creation



## Strategy

- The wider stack
- User centric rollout
- New features



## Planning

### Don't just lift and shift

The first step is to develop a content inventory and decide what you should be migrating. You should consider the customisations in place on the on-premises system here and determine what you really need. It is not always necessary that you need customisation when using the new SharePoint Online.

Remember that if your existing document management/intranet/SharePoint is a mess, then migrating what you have will not improve the situation. Create a new approach to structure and permissions etc. and take the opportunity to start fresh.

### Use your data

It's all about the data! When taking stock of what you have, ask yourself, is there any data that might cause issues with the migration? This can be anything from large files to libraries of outdated content. And yes, we've heard the 'But what if I need it?' argument, but trust us not everything needs to be migrated over, taking over what is completely necessary will help keep your SharePoint environment clean and tidy.

Make sure you carry out an audit of your documents, there is no value migrating terabytes of files you will never use. Don't underestimate the effort involved in doing this properly as it does involve users.



### Don't focus on custom solutions

Jack of all trades, master of none. Back in 2010 there was a real focus on making SharePoint 'do everything' by using custom solutions. This led to lots of third-party apps being all over SharePoint environments, that quite often ran out of support and racked up expensive bills to replace.

Nowadays if you move to SharePoint Online, there are lots of off the shelf apps that can provide this capability with a focus on integration with SharePoint rather than application hosting. SharePoint then only forms part of the wider Microsoft 365 picture. Ensuring you consider a plan for these custom solutions, identify replacement functionality and how these fit into your migration is key.



## Governance

### Form a governance strategy

Forming a governance strategy early in the process of your migration is crucial. One of the biggest issues when we have encountered SharePoint intranets, is the lack of governance. No control on site creation, complicated user permissions, document sprawl everywhere all leading to a bad user experience.

A SharePoint governance strategy will form the policies and processes users need to dictate how they will work together and ultimately define what they can and can't do. Without one, your SharePoint environment is likely to become chaotic, and we don't want that do we?

We recommend beginning with your source site. This is the site you will be moving everything from, so if this site is heavily ungoverned, this can make migration a challenge as you're essentially carrying over previous errors to your new environment. Without a governance strategy it is also much harder to ensure successful adoption and get all users on the same page.

### The general structure – Hubs

In classic SharePoint on-premises you often have a top-level site which has numerous subsites under it like a tree. This structure is all well and good, however when it comes to business restructuring this structure doesn't lend itself very well to change. Say you have to move sites between different departments, this is not very easy to do as the setup is not designed to work that way.

With SharePoint Online we recommend using the hub structure where you're associating sites with a designated hub site, and you can easily move a site from one hub to another without direct inheritance. This works well for search and navigation and how you should start structuring your new SharePoint Online environment for the migration.

### Permissions

To ensure security and governance for your SharePoint sites, use the group model to set clear permissions. These are broken up into owners, members and visitors.

Permission groups	Access
Owners	Manages the site
Members	Can edit the site
Visitors	Read-only access to the site



We're living in a world where cyber security threats are on the rise which is why we would also recommend the following tips:

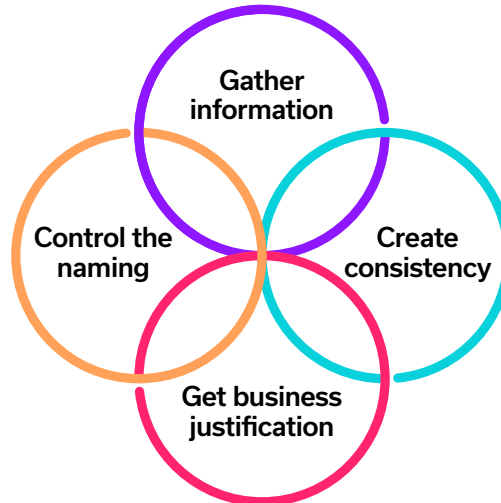
- › Apply common navigation and branding across associated sites
- › Have a simple permission structure based on M365 groups – owner, member, groups for each site
- › Follow the least access/least privilege principle to give people what they need – this is when only specific people have access to a site
- › Search across all associated sites

### **Controlling SharePoint creation**

Stop your SharePoint environment looking like a jungle by taking control at the very start. When you're starting afresh in M365 you might want to put on some restrictions on site creation and naming conventions. You could also use tools to manage how new sites are created.

For example, say a user wanted to create a new site, you can use a Microsoft form which could ask for the department and justification for that site. You could then use a Power Automate flow which would forward this request on to the correct person for approval.

You want to avoid the common scenario we were faced with around Covid-19, where organisations were implementing M365 and building endless sites with no real structure. This might have seemed like a good idea at the time for small term collaboration but created a governance nightmare.





## Strategy

### **The wider stack**

As SharePoint works as part of the Microsoft suite, think of ways you can utilise the other tools available within the platform. If you were using Excel exports for your reporting before, you now have Power BI that can help bring your data to life and take collaborative working to a new level.

It's important to remember that it is not a single entity and will realise its true potential when used alongside other apps like Microsoft Teams, Office 365, Viva, Power Apps, Power Automate and Power BI.

### **User centric rollout**

As with any system migration, you'll likely experience the full spectrum of emotions from staff as they react to the change. Some will be enthusiastic adopters, while others will see the process as a waste of time. Get ahead of potential barriers to user adoption by engaging users throughout the design and roll out approach.

Consider awareness-raising activities (i.e. demos, showcases, posters), training and post-migration support to ensure users are prepared to embrace change. Microsoft provide a range of [useful resources here](#) to help your users learn everyday tasks they'll need to know to be successful with SharePoint and OneDrive.

### **New features**

Keep on top of new features and processes. When migrating from an on-premises environment, you'll notice that features are usually more user-friendly in M365. For example, when migrating, it's not always worth taking a workflow over as in SharePoint, Power Automate will most likely give you a better solution.

Make sure you have a plan to take advantage of the new features available as this will drive a lot of the improvements and value from the migration.



## Case studies

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The Scottish Prison Service were looking to migrate data from their SharePoint 2013 servers to SharePoint Online as part of an existing data and structure review. Bridgeall worked closely with the team reviewing what SharePoint sites they had in their old environment, while designing new SharePoint sites in SharePoint Online. In total we built and migrated hundreds of sites across 26 departments taking into account new features and methods of working in SharePoint Online.



Link Group, one of Bridgeall's long-standing customers, were selected by Weslo Housing Management to be their preferred partner for the transfer of all homes and services. This meant that Link Group had two separate IT infrastructures that they were looking to merge to support the greater collaboration and integration of the new business.



We worked with the team to help with the migration of SharePoint, Microsoft Teams, OneDrive, Network share and email. A big bang approach was used with all data and users being migrated with minimal downtime.



The  
Scottish  
National  
Investment  
Bank

The Scottish National Investment Bank launched as an independent organisation in November 2020 and had committed to migrate from the Scottish Government-provided managed services and devices in short timescales.

We worked with the team to export existing user and shared mailboxes. Data extracts were also taken from file shares and their document management system and transferred into SharePoint Online using the Microsoft SharePoint Migration Tool. Users' personal files were also transferred in the same way into OneDrive for Business. As a result of our efforts, we were able to migrate data from the old environment to the new seamlessly. The project was also delivered with very little downtime.



# What's next?

## SharePoint briefing

Bridgeall, a leading Microsoft Gold partner, provides a 2-hour briefing for organisations to see and understand how they could benefit from SharePoint. This briefing will cover the full range of use cases including document management, intranets and collaboration.

[FIND OUT MORE >](#)

\*Please note all prices listed in this guide are correct at the time of writing. Prices are subject to change by Microsoft.

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