



Top 20 Lessons Learned from Windows and Exchange Migrations

Microsoft has ended providing further product releases for Windows NT and 2000 as well as Exchange 5.5 and 2000, so it is more than probable that a lot of businesses are already on a migration path to Windows and Exchange 2003. The new Microsoft Vista and Longhorn Server versions will also create new business demand for upgrades. Depending on the size of the company this migration project may be a long term engagement of the IT departments carrying significant risk due to the importance and the integration of the Operating System to the business workflows and communication. Below we provide the top 20 Lessons Learned for this migration path.

Planning

1. Invest time in the planning phase and ensure that included as part of the deliverables are a signed off business case, a detailed project plan, a nominated project team and any required budget properly allocated.
2. Before starting, ask the following questions and make sure that you are confident about the answers:
 - Does the project team comprise of the right individuals and are they qualified to perform the task? Sometimes a team is formed due to historical reasons and not due to their capacity to perform a project.
 - How much understanding does management have about the project, the commitment of the team, the financial impact and its duration? The more they know, the better.

Design

3. Be stringent about the design deliverables. No project can start without a clear understanding of the target result. Also it's much easier and productive for the team to have a clear goal to their activities.

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4. Include all relevant parties for discussion and input during the design process. Get their comments and concerns and work with them to satisfy true business requirements. Be realistic about the scope of the project and what you can deliver, don't over extend to please everybody.
5. Get the design documents validated by an experienced third party outside of your organisation. Circulate the draft documents to other technical parties in the company and organise meetings to get their feedback.
6. Create a report in which you demonstrate how the design deliverables link to the original business requirements. For example; if increased security of the OS is a requirement, use a table to link how and when this requirement will be met. Using this method, all the project benefits are tracked for you as well as your seniors.
7. Early on, establish a sign-off process that ensures that each document that nears completion is reviewed and signed off by the appropriate resources. This brings increased levels of responsibility and accountability across the team. Finally keep in mind that some documents may continually evolve but there are some that should remain unchanged. The overall design document for example should never be changed half way through the project.

Implementation

8. We learn something everyday, so assume that the project team will constantly learn things that have positive and negative outcomes for the project. Early in the project create a process to capture and communicate these lessons to avoid or minimise issues further along the duration of the project.
9. While Windows and Exchange are technologies many are familiar with, it is a requirement that you perform a wide scale pilot to validate the design. Don't start the project without having the design tested. There is nothing worse than expected functionality not being delivered.
10. Get the project plan organised in such a way that resource availability is booked well in advance. People should know how much work is expected from them and when (no need for exhausted team members).

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11. Ensure that all project documentation is followed from the beginning to the end of the project. Very often things may get a bit loose during the end of the project and checks get missed out.
12. Things do break, so develop a risk management matrix and an incident management reporting and response procedure. This way, you will be prepared to contain issues and act in a structured way to minimise impact.
13. Well before changes are ready to be made to the production environment, ensure that a formal change management process exists for the project. Ideally all change requests will have been documented in the project plan and distributed to the appropriate authorities for sign off.
14. The team that will manage, support and maintain the environment must have the necessary knowledge so arrange for training, new support queues and knowledge transfer meetings.
15. The user communication element of the project is very important, so nominate a dedicated resource for this task, or if it's not possible, allocate enough time to plan its execution. End-users should be notified of changes that could potentially have an impact on their systems and processes.
16. Store all the relevant documents in one place such as a secure intranet with audit capabilities. The project plan, the project methodology, the design, the change requests as well as all the other project documents should be available from a single, master repository accessible by all members of the project team.
17. Ensure that the Disaster Recovery Plan is verified and maintained. Backup, rollback and archiving mechanisms have to function throughout the duration of the project, regardless of changes.
18. Initiate an incentive program or tie the project deliverables to the performance goals of the team. Financial benefits and organisational recognition keep the moral up.
19. Keep the reporting to the management accurate and concise and ideally to one page. Emphasise the benefits accomplished in the way of financial or productivity gains.
20. Have a succession plan in place. While nobody is irreplaceable, it helps when the team can function regardless of changes in team members.