

LeadThem Consulting and Company X SharePoint Migration Case Study

Company X is an independent international energy company based in Houston, Texas. They were required to divide their IT department following the split off of their petroleum division. They had a window of time provided by the SEC to complete the split. This split required moving current SharePoint, Public Folders, and Notes environments off of the main company systems and into the newly created petrol SharePoint environment. They were given twelve months to complete the majority of the effort surrounding the split.

Company X contracted with LTC after several months of unsuccessful attempts at performing the migration of data and applications on their own. When LTC was contracted less than three months remained available for the migration to be completed before SEC fines would start to accumulate and not one piece of data had been migrated. What was a tight, but reasonable, timeline of twelve months to complete the task had become three months.

Due to the shortened timeframe LTC was forced to reduce normal discovery cycles. We used a minimal number of days to complete discovery and analysis and decided to focus our effort instead on moving data. Proper analysis and data cleansing, including the removal of inactive sites, reduce average migration efforts by 75%. In this case it was decided that a higher percentage would be moved and the clean-up could be taken care of once the SEC guidelines were met. The migration effort on this project consisted of over 500 gigabytes of data in 450 SharePoint sites and 225 public folders containing over 200 gigabytes of data. Even with a quick analysis we were able to reduce effort to 280 sites and 200 gigabytes of data in SharePoint, and 125 public folders containing around 100 gigabytes of data.

The first two weeks of the engagement ended up being light analysis of data and heavy analysis of network connectivity and environmental factors to ensure there would be a possibility of moving everything without eliminating further old and unused data from the pool. Within the first two days we discovered that the product chosen by the company to migrate a portion of the data would error out due a lack of compatibility with SharePoint, so a tool change was made and we remodeled the migration effort using a tool that we had experienced success with on past migrations. The discoveries made on bandwidth and throughput during the testing forced us to employ several workstations to allow a multithreaded migration effort to take place. We provided a revamped schedule which allowed us a fourteen hour migration window on a nightly basis to ensure we did not impact users during peak usage periods.

The day the client agreed to the migration strategy, we had less than two months to move all of the required data and retool applications to work in the targeted SharePoint environment. We put together a schedule which allowed the migration to slowly build up to full speed allowing user acceptance testing to be done in a manner which would have minimal effect on the users involved. The migration methodology was proven successful quickly and we were up to full speed within a week. Once the methodology was accepted we turned our full attention to completing the migration effort as quickly as possible. By employing several consultants working twelve hour shifts over nights and weekends, we were able to have data migrating during every available hour of time that we had the network at our disposal. We ended up meeting the SEC guidelines for the migration with one week left to spare. The extra week was used to work with the users on cleaning up of data in SharePoint to reduce the amount of time backup and recovery of the environment would consume on a daily basis going forward.

The amount of gray hair creating moments and uncomfortable meetings with executives has been minimized in the above recounting of this effort. Two weeks into the project we were told point blank by one of the executive teams that they thought we were on a path to failure and were anticipating paying fines and possibly losing their jobs due to this. This was not as any result of our efforts but because they thought they had set us on an impossible task. Needless to say, when the migration was completed there were many sighs of relief from both sides of the table. Both sides offered congratulations to the other, thanked each other for mutual faith, trust and hard work, and began discussing next steps on ensuring future deadlines would be met in a less uncomfortable manner.

Looking back at this case allows us to draw several conclusions;

1. Lack of proper planning increases costs and accuracy during a migration project
2. Most companies do not have technical or project management resources who can handle full blown migration projects. The reason for this is that the need for these skills comes up rarely in the day to day operations and management of the IT environment.
3. Experience is of the utmost importance when dealing with a large scale migration, and that experience is brought forward by a team that is well versed in migration methodology backed up by diverse technical skills.
4. While throwing bodies at a problem does not always lead to a solution, in some cases it is the only way to attack a timeline issue.