

10 Steps to the Cloud



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10 Steps to the Cloud

Moving your company IT to the cloud can be a little like living through a home renovation. There can be very unpleasant surprises along the way if the process isn't carefully detailed in advance, and if the people you contract with are not highly detail oriented, and technically top-tier.

Moving to the cloud, even with all of its attendant benefits, may turn your anxiety dial up a notch or two. It's almost unavoidable. But you should know that handling migrations is something we do every day, and do very well.

Our migrations teams are authorities on the subject and work as a dedicated migrations department. "Dedicated," meaning that this is all that they do, though it also describes their level of commitment to making the move as close to flawless as can be.

The following migration map is one that we have perfected over the years. It keeps surprises to a minimum, and guarantees a high level of involvement, and understanding, for each of our clients.

01 | PROJECT SCOPE AND EVALUATION

Before we set off on a journey, we need to know where you are headed. By now you'll have worked with a Business Development Executive, and will have filled out a detailed project checklist. The goal is to make sure that all of your IT choices reflect the goals of your business. The first step in the migration process then is to review this list and reaffirm exactly what your objectives and needs are.

For larger clients we construct a project management website. This gives everyone a central place to update and access information as the migration proceeds. It becomes a convenient and detailed reference that enables you to see exactly where we are at any point in time.

02 | TRANSITION TEAM LAUNCH

As the name suggests, this is where our full transition team reviews the migration in detail and discusses how best to accommodate your particular needs throughout the transition. We might learn, for example, that the best time for the migration to take place is evenings rather than weekends. Weekends may be your busiest time. This step helps us to specify what will happen when.

There may be variations in the migration needs of each of your offices. Whatever your concerns, whatever your priorities, everything is noted and built into our approach. There are always questions, not only during our Team Launch meeting, but also throughout the entire migration process. No question is too small or unimportant. The more you know, the more comfortable you'll be. The more we know, the smoother things will go.

03 | DISCOVERY AND ANALYSIS

Once we know where we're headed we need to know where you presently stand. To answer that question we execute a comprehensive IT environment inventory. We note such things as the scope of your IT assets—servers, data, printers, applications--where they're currently housed, how they are configured, what their interdependencies are, and their level of stability.

We look at where your users are located and appraise your connectivity to ensure that their applications work flawlessly in the cloud.

We might discover that some of your applications are "vintage" and recommend upgrades. Or they may be applications that we know to have built-in shortcomings, even though they're new. This can be an ideal time to fine-tune a number of things to maximize performance.

Discovery and Analysis is a critical step. It's essential that it be handled in a detailed and systematic fashion, and your involvement is invaluable.

During this process you may be provided with a highly detailed discovery/planning questionnaire that you'll fill out. Much of this information we'll have from your initial Project Scope Evaluation, but this additional information helps us to further delve into your assets to minimize surprises.

If you don't have anyone on staff with the IT background to fill out questionnaire, or for any other reason prefer that we fully oversee this step, we'll be happy to do this for you. This will be one of the decisions you'll make with your Sales Partner. Armed with this information, we put together a project plan that details all the tasks that will need to be done. It's an exacting appraisal. Going forward, some of these tasks we'll work on together.

04 | PLANNING AND SCHEDULING

A migration can be as quick as two weeks, or take up to eight. This depends on the size and complexity of the job. Each step of the physical transition is scheduled in advance. Each member of our team is briefed on what they'll be doing each day of the migration. Our process, while detailed, actually helps us to complete our migrations more quickly than the industry norm. We're also very good at staying on schedule.

05 | PROVISIONING SOLUTIONS

Here is where the solution is built. Servers. Storage. Disaster Recovery. Everything that was specified is implemented. Standard applications are the first thing we pre-install. Next, we provision your custom business applications.

Your user and group accounts are then created. We have a dedicated department that handles the deployment and management of client-specific applications. If needed, or if you prefer, your vendors or consultants can be engaged at this stage. It is also possible to complete this step on your own if your organization has the expertise on staff.

We're particularly careful to note what permissions each person should have and in which departments they reside.

This is the stage of your migration where we train your IT Director, or whomever you designate as Transition Manager, in portal use and management. If there are multiple people in your company who should have these skills, we can train them as well. Their knowledge will span everything they need to know to simplify their jobs, including managing account permissions and portal content.

The last step in Provisioning is to configure print servers and local domain changes. We'll be happy to take care of these details for you, if you wish.

06 | TESTING AND TRAINING

Before going live, your applications have to be tested in their new environment. The goal is to resolve any software hiccups that may arise prior to going live. In most cases we use a copy of your real data to run these tests. Complex applications are tested the same way. We take a snapshot of real data and then work with it in a test environment.

As part of our testing process we create a User Acceptance Group. We give this group User Acceptance Training, then we set them loose to explore, play with, and use the portal every way they can think of.

We ask them to give your data, applications, and collaboration capabilities - everything that's at their disposal a workout. When everything works like a dream, you'll give us the go-ahead.

Two to three days before going live we offer training sessions for everyone in the company. These require one-hour time blocks. We can easily do this remotely, or on premises, whichever you prefer.

07 | CUTOVER

We're getting very close now to taking you into the cloud. During Cutover we migrate your company assets, such as your email, applications, database, and document management systems to an RIA WORKSPACE Data Center from your in-house servers or from another provider.

In most cases, this information is transferred electronically. Occasionally it requires a physical transfer prior to loading. Anything we ship on physical media is encrypted, and we send duplicates using two different carriers, ensuring against loss and migration delay.

Many clients are particularly concerned about losing email data during a migration. We take email as seriously as every other IT asset. All mail traffic will be queued for a short duration. Nothing is lost or returned. If you need extra assurance as to how thorough we are, we'll be happy to detail this process with you.

08 | GO LIVE TASK FORCE

This is your first day as a company with the RIA WORKSPACE Webtop. To help make everyone's transition as smooth as possible we assign a Go-Live Task Force. This is a group of extra technicians standing by on our end. Depending on how large or complex your migration happens to be they'll be ready to assist throughout your inaugural day, or for some days afterward.

If there is a team on-site, they'll typically be present for at least two days to make sure that everything is smooth sailing.

09 | CHAMPAGNE WEEK

Champagne Week is your first week in the cloud. Here, your Account Manager will spend extra time with you making sure that everyone has whatever level of additional help they need. Yes, a bottle of champagne will be opened.

As time goes by, and your company begins to leverage all of the advantages of the cloud, you'll come to appreciate how appropriate it was to begin with a glass of champagne.

10 | ANALYSIS AND REVIEW

This is a step we undertake internally. Each quarter our team meets to discuss our migration process. After hundreds of migrations, across a very broad range of industries, our approach and people are quite polished, but Analysis and Review helps guarantee that we remain top-tier.