Virtual Administrator’s Ngenx Migration Project Plan

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Agreement Closing

This stage is a critical time to make sure your client gets a good taste in their mouth about the decision that they made. It is often said that first impressions count for a lot, so it is important to make sure that your communication with your client at this stage is swift and clear. The handoff from sales to the migration team (or person) needs to be smooth and easy on the client. If there is any missing information, don’t hesitate to reach out to your client and collect. You will look like a professional if you are communicating consistently.

Stage Tasks:

- Sales handoff to Project Manager Meeting
  - Review the Network Assessment
  - Review any customer special requirements
- Add Agreement in PSA
  - Scan and save signed agreement
- Add client to any marketing / onboarding automation tracks
  - Welcome to the program – get excited!
  - What to expect over the next week or two (the length of the migration).
- Charge any upfront fees
- Order new equipment for customer
  - Desktops / End-points
  - OS upgrades
  - Routers / Switches
  - Backup Internet/LTE Cell Connection?

Project Setup

An extension of the agreement closing phase, the project setup can be critical to keeping all the plates spinning later on in the migration process. Use of a project management software such as basecamp can aid in communication with the client and also help keep track of all the little details moving forward.

Alternatively, using tickets in the helpdesk assigned to the project manager will also work. Create tickets (or tasks) for each stage of the process and give people a chance to discuss each step if there are special details.

Stage Tasks:

- Send out to project team client acquisition email (pat-on-the-back to everyone + first steps).
- Project Status Meeting
- Setup appropriate tickets / tasks to PSA or Project Management Software.
- Assemble Project Team in PSA or Project Management Software
- Set Project end date (often one week past the go-live date)

Kickoff Meeting

The kickoff meeting really revolves around collecting data and making sure you know what you're jumping in to. It probably should take place at the client's site. You should use some tool for discovery (such as Kaseya) to identify machines and collect vital information such as license keys for software running on your client's machines.

You should use the Client Migration Spreadsheet (a separate document) to fill out everything running at your client's website.

Stage Tasks:

- Send kickoff meeting invite to the client.
- Meeting
  - Fill out the Client Migration Spreadsheet (attach it to the project)
  - Establish a tentative "go-live" date (usually over a weekend – *give at least a week of lead time to communicate with Ngenx*).
    - Account for time to order additional required hardware.
    - Account for time to ship or upload data to the cloud environment.
    - Account for time to train the client and their employees.
- Install Kaseya (or other compatible RMM or discovery tool) on workstations and servers for initial Audit.
  - Capture license key information.
  - Capture application list information.
  - Capture server list.
  - Capture PC list and compare it to user list (laptops / desktops / tablets / etc).
- Analyze Data Migration Requirements
  - Look at shared data drives
    - Record size / drive paths / access security.
    - Test bandwidth (speedtest.net) to determine if it is possible to upload or if it needs to be loaded on an external drive and mailed.
    - Confirm client email setup. PST files that need migration? Exchange server? Cloud based?
  - Account for OST file size – can squeeze file size.
- Schedule a data migration meeting.

Initial Cloud Workspace Setup- REMOTE

This task can happen asynchronously with the next stage of the project. The client's endpoints must be prepped to connect to the cloud environment. These steps really are more gotchas than a refined list of tasks. You will want to customize this section to your liking.

Stage Tasks:

- Distribute RDP client to end-point machines.
  - Test that client machines have a connection of "Good" or better.
- Verify firewall status and make sure client machines can access RDP ports.

- Verify ThinPrint is installed on client machines.
- Check RDP client setup checkboxes “Visual Styles” and “Font Smoothing” to improve client experience.
- Remote local printers not needing in the cloud via ThinPrint.

Cloud Workspace Setup- Via CWS

This is one of two of the most involved steps in this entire process. The setup and initial provisioning can take time and cause some headaches. Be sure to stay on top of communication with Virtual Administrator and Ngenx. Any issues you run in to may be easy to resolve with a quick email to Ngenx support (support@ngenx.com).

Lean heavily on the Client Migration Sheet you filled out at the kickoff meeting and you should come out ahead in this process.

Stage Tasks:

- Create Customer in Ngenx Console (CWS)
  - Choose datacenter Artisan-Southwest-01 for 5+ seats and Google-Central-01 for NFR or 3 seat. Outside of the US may need to use a different datacenter.
  - Select and install MS Office Version.
    - If bringing your own Office or Office365 license. Make sure to upload a receipt and/or license key to the application console.
  - After client setup and provisioning, change the Cloud Workspace “settings.”
    - Enable Migration Mode.
    - Turn on File Audit Logging.
    - Turn on lockout notifications (make sure you get notified if clients can’t log in).
  - Add client FTP and information to PSA Configuration Tab.
- Create Cloud Desktops
  - Create users with established naming convention.
  - Double check that “File audit” and account lockout notifications are set in the Client Settings.
- Verify Applications
  - Collect application licenses.
    - Use Kaseya or other discovery tool to find license keys.
    - Find the “Shoebox” located in the customer’s closet to find additional licensing information.
    - Collect application install media.
    - Request application certification from support@ngenx.com (if applicable)
- Install Applications
  - Install browsers, PDF printer, Flash, Java, other common software.

    - Install applications from client list.
    - Upload license keys in CWS backend.
    - Select application access permissions (enable them for user groups in CWS backend).
- Setup Security Groups Via CWS
    - Make sure to assign users to the groups.
- Setup Folders with Permissions via CWS
    - Make sure to assign users/groups to the folders.
- Show users how to export favorites / bookmarks (or do it for them).
    - Export to local device. Upload to client X: Drive. Import into Cloud Workspace browser.
- Verify users have uploaded personal data to their X: Drive

Critical Customer Applications

Really an extension of the application install process. Creating specific tasks or tickets for each application install will help you follow up and make sure everything is installed and configured properly.

Stage Tasks:

- Create a ticket / task for each application install and close the tickets only when the software becomes available on the Virtual Workspace. Some installs may take a few days. If you see no motion after a few days, follow up with Ngenx support (support@ngenx.com) to ensure that they aren't waiting on you for additional information / install media.

Email Migration [Optional]

An optional step, but one which can increase stickiness with your clients and also give you a deeper reach into their organization is to migrate email. This may be a good additional benefit wrapped in to the initial sale.

Stage Tasks:

- Setup Hosted Exchange (Intermedia?)
- Verify email addresses to be migrated.
- Migrate Local Outlook data to Hosted Exchange server.
- If using older form of outlook, don't forget the NLK files!

Migration of Data

The data migration will be the second most involved part of this process. This will also be the most confusing part for both you and your client. Be sure to have a meeting prior to migrating to clearly communicate what is going to happen next and when it is going to happen.

Use this time to also answer any client questions. The more you communicate with your client, the smoother this process will go. You'll also probably need to help your client organize their data in some form to make it portable to the new Cloud Workspace environment.

Stage Tasks:

- Data Migration Meeting
  - Overview the process with the client.
  - Discuss responsibilities with client.
  - Answer any client questions.
- Migrate Shared Server Data
  - Determine data migration method.
    - FTP Upload
    - Drive Mail-in
- Migrate Desktop Data to User X: Drive
- Migrate Application Specific Data
  - Determine the migration method.
    - FTP Upload
    - Drive Mail-in
- Extract Data from server to External Drive (if required)

Testing

A critical stage in the process. You'll find that you missed something more often than not. Catching it before your client does can help! Poke around and make sure everything is working as intended before turning the keys over to your client.

Stage Tasks:

- Test/Verify Individual Data Migration.
  - Open files and verify they work.
- Test/Verify Shared Data Migration
  - Open files and verify they work.
  - Check user access permissions to confirm they're setup properly.
- Test user accounts in the Cloud Workspace.

    - Make sure they can login.
- Test Applications
    - Login to All Applications.
    - Open Files.
    - Save Files.

Customer Training

This session is a great chance to communicate with your client and their end-users. Don't miss this opportunity to make sure people know what is going on. If you want to automate this to an extent, then you can offer recorded videos on certain tasks. Use Snagit, Camtasia, or Open Broadcaster to recording what you're doing.

Stage Tasks:

- Create PSA Records for Cloud Workspace
    - Desktop inventory.
    - Cloud Workspace Configurations.
- Setup training account in Cloud Workspace.
- Training Session
    - How to log in.
    - How to access personal files.
    - How to access shared files.
    - If self-managing, how to change permissions.
    - How to print.
    - How to scan [optional].
    - VOIP concerns?
    - Address additional concerns.
- Deploy "Help Desk" stickers (Panic Card)
    - Affix support number/email to terminals for people to contact you for additional support.

On-Site Work

Some final tasks which will probably require boots on the ground to complete.

Stage Tasks:

- Setup Scanning to the Cloud

- There are three options for scanning
  - Scan to local desktop, then copy/paste to cloud desktop.
  - Scan to email and email to themselves.
  - Scan to FTP (assuming the scanner supports this)
- Install any new hardware
  - Desktops
  - Networking Equipment
  - Etc

Final Prep- 3 Days Before

Take some time to dedicate to closing out migrations and don't leave them hanging. If there are loose ends it'll reflect poorly on your company and also overwhelm your migration team as you get more clients. Make sure to make that final push to wrap up all migration tasks.

Stage Tasks:

- Perform migration clean-up.
- Finalize any remaining tasks/tickets in project.

Final Data Synchronization

Move the final changes in the client's files. Run a diff report if need be and make sure you copy up anything that changed since your initial migration.

Stage Tasks:

- Final Email Sync.
- Final Application Sync.
- Final Shared Data Sync (diff).
- Final Personal Data Sync (diff).

Going Live Day

You made it! WOOHOO! It is good to be on-site and make this an event. Don't forget a bottle of bubbly (or maybe a cake) to congratulate your client on making the right choice for their business.

Stage Tasks:

- Disable Local Environment.
- Switch MX Records for Email [optional].
- Project Manager On-site or On-call.
- Setup cloud workspace on tablets or any remaining devices.

Post Migration

Once you’ve moved to the cloud, there are a few things which need to happen on site. You can wait a week or a month before really tackling this, but give some time for the client to shift naturally to their new environment before pulling the carpet out from under them.

Stage Tasks:

- Cancel “Other” Services
    - Spam Filtering
    - Other Email
    - Un-needed cloud services
    - Any licenses which were replaced
    - Remove RMM agents from any retired machines (if needed)
- Create Cloud Workspace “New User Template” for rapid deployment of new users.
- Decommission on-premise equipment.
- Post cloud customer review meeting.
- Populate configuration records in PSA:
    - Printers
    - Scanners and setup
    - Faxing
    - Remaining on-site data or appliances