

A high-angle photograph of two hands typing on a silver laptop keyboard. The laptop is open, and the keys are clearly visible. The background is a light gray surface. There are decorative geometric shapes: a green triangle in the top-left corner and a blue triangle in the bottom-right corner. The overall image has a clean, professional aesthetic.

EBOOK

# Microsoft 365 Migration & Management

Comprehensive Guide  
for Businesses & IT Departments

TPX<sup>®</sup>

# EXECUTIVE SUMMARY

Microsoft 365, the cloud-based office productivity application suite from Microsoft, is one of the most widely used software sets, with more than 1 million companies subscribed and 250 million users. It's popular for its accessibility, user-friendly interface, integrated applications, collaboration features and relatively low cost.

For these reasons, many businesses are looking to migrate to the Microsoft 365 platform. This eBook looks at companies' challenges when migrating to or managing Microsoft 365.

## Key Takeaways

**Microsoft 365 includes many well-known applications and lesser-known services, including productivity analytics, data lifecycle management and insider risk management.**

**Migrating to Microsoft 365 from a cloud-based or on-premises platform can be complicated. However, the complexity is eased by following a deployment planning checklist.**

**Many businesses face challenges with insufficient bandwidth, speed constraints and data errors when migrating to Microsoft 365.**

**Many businesses fail to take advantage of all the applications Microsoft 365 offers.**

**Outsourcing Microsoft 365 management can give businesses instant access to expertise and quicker time to value without adding overhead.**

# Table of Contents

## **What is Microsoft 365?**

What Are the Features of Microsoft 365?

What Are the Benefits of Microsoft 365?

## **Why Outsource Microsoft 365 Migration & Management?**

What Are the Benefits of Outsourcing Microsoft 365 Migration & Management?

## **What's Involved in Migrating to Microsoft 365?**

What Are the Steps in Migrating to Microsoft 365?

What Are the Challenges in Migrating to Microsoft 365?

## **What's Involved in Managing Microsoft 365?**

What Are the Requirements for Managing Microsoft 365?

What Are the Challenges in Managing Microsoft 365?

Why Use Managed IDR with Microsoft 365?

## **What Should You Look for in a Microsoft 365 MSP?**

What Are Key Considerations in Selecting an MSP to Manage Microsoft 365?

## **Why Choose TPx for Microsoft 365 Migration & Management?**

What Microsoft 365 Migration & Management Services Does TPx Offer?

What Are the Benefits of Partnering with TPx for Microsoft 365 Migration & Management?

## **Why Choose TPx?**

TPx Is Your One-Stop Shop for Managed IT & Collaboration

## PART 1:

# What is Microsoft 365?

Microsoft 365 is a suite of productivity solutions that are delivered “cloud-first.” They can be licensed and accessed in the cloud or licensed and downloaded to a desktop or laptop.

## What Are the Features of Microsoft 365?

Microsoft 365, formerly Office 365, encompasses several familiar software applications, along with additional lesser-known services. Microsoft 365 features include:



### Productivity Apps

Word, Excel, PowerPoint, Outlook and Publisher

### Email, Calendar & Scheduling

### Meetings, Calling & Chat

(via Microsoft Teams)

### Social, Intranet & Storage

SharePoint, Yammer, Viva Connections

### Content Services

Graph API, Search, Streams, Forms, Lists, Delve, Expertise ID, etc.

### Project & Task Management

Microsoft Planner + To Do

### Analytics

Productivity Score, Secure Score, Compliance Management, Power BI Pro

### Automation, App Building & Chat Bots

Power apps, Power Automate, Power Virtual Agent, Dataverse for Teams

### Viva Insights & Viva Learning

### Information & Threat Protection

### Cloud Access Security Broker (CASB)

### Insider Risk Management

### Identity & Access Management:

Active Directory, MFA, SSO, etc.

### Endpoint & App Management

Intune, MDM, etc.

### eDiscovery & Auditing

### Data Lifecycle Management

## What Are the Benefits of Microsoft 365?

Microsoft 365's extensive functionality enhances internal and external communication and collaboration in the following ways:



### Scalability

Microsoft 365 is highly scalable, enabling businesses to easily increase or decrease usage depending on fluctuations in headcount, mergers and acquisitions, or even the evolution of the workforce due to changes in the market or environment.



### Mobility

Microsoft 365 enables users to access applications in the cloud from an internet-enabled laptop, desktop, tablet or smartphone, so they can be as productive and collaborative while working remotely as they would be in an office setting.



### End-user Productivity

Microsoft 365 enables workers to collaborate and communicate easily and effectively, driving increased productivity. Microsoft's suite of integrated applications is accessible from anywhere, so employees can work together seamlessly across time, space and application, ensuring problems are addressed quickly and goals are achieved easily.



### Collaboration

Microsoft 365 is a comprehensive collaboration solution enabling employees to connect via their preferred communication methods, such as Teams meetings, Outlook emails, file collaboration via OneDrive, Yammer chats and more.



### Integrated Apps Suite

Microsoft 365's applications are integrated, so they efficiently exchange data. Furthermore, Microsoft APIs enable users to access data through other applications or third-party services.



### Security

Microsoft 365 offers many configuration settings and administration portals for enhanced security control. Additionally, each service is protected with its own authentication and authorization protocols and perimeter protection.

## **PART 2:** **Why Outsource Microsoft 365 Migration & Management?**

Microsoft 365 has countless features and customization options that can benefit nearly every business. Companies can either manage these aspects of the Microsoft 365 environment themselves or outsource migration and management to a third party, such as a qualified managed services provider (MSP).

**Businesses outsource migration and management of Microsoft 365 for these key reasons:**



### **Lack of Expertise**

The breadth of knowledge demanded by IT teams today is vast, spanning everything from database design to infrastructure management. However, managing Microsoft 365 requires specialized knowledge to optimize its functionality.



### **Lack of Time**

Due to the interconnected nature of integrated applications, devices and other technologies, IT departments are stretched thin putting out fires. Many IT teams don't have the time to handle Microsoft 365 migration and management.



### **Lack of Talent**

In today's job market, talent of all types is hard to find, hire and keep. The IT skills gap, in particular, is a well-known challenge for businesses – and this is especially true for SMBs that usually can't afford this highly paid and hard-to-source expertise.





## What Are the Benefits of Outsourcing Microsoft 365 Migration & Management?

Outsourcing Microsoft 365 migration and management provides businesses with the following benefits:

### Quicker Time to Value

Working with an MSP allows your business to skip hiring specialists and extensive migration planning and start reaping the benefits of a team of seasoned specialists from day one.

### Instant Access to Expertise

Outsourcing to an MSP delivers instant access to teams of trained personnel that are experts in managing your Microsoft 365 platform.

### Reduced Overhead

You won't need to hire, train or retain Microsoft specialists in-house since the MSP takes care of that process and expense for your organization.

### Affordable, Predictable & Scalable Plans

Outsourcing Microsoft 365 management can be less expensive than managing it internally. MSP solutions are scalable and offer predictable pricing, giving you control over your IT budget.

### The Ability to Focus on Your Business

You can focus on managing and growing your core business by outsourcing the management of complicated solutions like Microsoft 365 to experts.

### Added Security

While Microsoft 365 offers baseline security, working with an MSP typically provides your business additional layers of security around your cloud applications.

## PART 3: What's Involved in Migrating to Microsoft 365?

Migrating to Microsoft 365 from another cloud-based platform or on-premises solution may be intimidating because it touches so many of your productivity applications and involves moving your vital company data. However, with a bit of planning and process management, your migration to Microsoft 365 can be smooth and stress-free. With so many facets of your platform hanging in the balance – messages, files, chat histories, channels, security settings, permissions, etc. – it's essential to use a trusted deployment planning tool.

### What Are the Steps in Migrating to Microsoft 365?

Microsoft's [deployment planning checklist for Microsoft 365](#) offers a roadmap to guide you through migration and deployment. It includes five goals and steps under each. Your organization must also determine who will be responsible for each goal and the due date for completion.



1

#### Determine your deployment goals.

When migrating to a new system, you must determine:

- What are the scope and timeline?
- Who will track the project's progress and how?
- What KPIs will measure the success of your deployment?
- How will you communicate changes to employees?



## 2 Inventory your current environment and make key deployment decisions.

Before you can start migrating, you have to know what you're migrating, including:

- What is the number of users and accounts?
- What is the number and size of mailboxes?
- What versions and configurations do you have (browser, operating system, office application, mobile version, etc.)?
- How is your network set up (e.g., DNS hosts, proxy and firewall configuration, internet connectivity, etc.)?
- Where are your files located (e.g., shared files, intranet, etc.)?
- What intranets do you plan to migrate?
- What online meeting and instant messaging systems do you plan to migrate?
- What applications are integrated with existing systems (e.g., CRM, project management, etc.)?
- How will you create and synchronize accounts?
- Where will users' accounts authenticate?

## 3 Fix potential deployment blockers.

Use your platform migration as a chance to get your IT house in order, including these tasks:

- Clear up Active Directory accounts.
- Get your data (e.g., emails and files) ready for migration.
- Prepare your network.

## 4 Set up Microsoft 365 services to work for your organization.

Configure your Microsoft 365 subscription as follows:

- Verify the domains you want to use with your subscription.
- Configure application settings (e.g., email, instant messaging, online meetings, web collaboration, file storage, Yammer, etc.).
- Optionally prepare for directory synchronization.
- Optionally prepare for single sign-on.
- Prepare the service desk for the upcoming migration.
- Test the deployment and optional migration process.
- Tell your users about the upcoming changes and how they will affect them.

## 5 Roll out to users.

When it's time to flip the switch, complete the following steps:

- Add your users and assign the appropriate licenses.
- Optionally migrate data (e.g., email, files, etc.).
- Validate functionality.

### Then complete the final steps:

- Migrate DNS settings to point to Microsoft 365.
- Reconfigure your client systems (Office, Outlook, Outlook for Mac, and mobile devices) to connect to Microsoft 365.
- Tell your users they can start using Microsoft 365.



## What Are the Challenges in Migrating to Microsoft 365?

Migrating to an entirely new platform is a significant undertaking. There are bound to be some challenges. Here are a few common hiccups to prepare for when migrating to Microsoft 365:

### Planning

As the old adage goes, “Failing to plan is planning to fail.” System migrations are complex projects that need significant pre-planning to succeed.

### Downtime

The migration should be as painless as possible for users, but if problems occur, there might be downtime, which could have a massive impact on productivity.

### Insufficient Bandwidth

Migrating to a new platform almost always involves an upgrade or service enhancement. Understanding if your current bandwidth can handle your future applications is critical.

### Speed Constraints

The speed of your network connection can cause transmission delays or errors during your migration and should be monitored closely.



### **Data Migration Errors**

Sometimes, data doesn't translate or map correctly to the new platform. While email usually translates, Sharepoint and linked Excel files often encounter issues. The best way to prevent and uncover these issues is by running through various test cases to ensure accurate migration.

### **Change Management**

One of the biggest obstacles to success in migrating to Microsoft 365 is users' resistance to change. Overcommunicating and demonstrating how the new platform will make their jobs easier will help overcome slow adoption.

### **Hybrid Environments**

Migrating to Microsoft 365 in a hybrid on-premises/cloud environment with various disparate endpoints can prove challenging simply because there are more facets of the network to consider. However, hybrid environments also can prove beneficial by providing failover for mission-critical applications during scheduled downtime or if a problem arises.

## PART 4: What's Involved in Managing Microsoft 365?

Once your migration to Microsoft 365 is complete, the software suite must be properly managed to deliver promised results.

### What Are the Requirements for Managing Microsoft 365?

Whether managed internally or outsourced to a trusted partner, several areas require administration, monitoring and management, including:

- **License management** – Managing licenses enables you to monitor usage, run reports and forecast budgeting. It also prevents downtime by keeping your apps updated and compliant.
- **User help desk/problem management** – Ensuring your help desk has the expertise and tools to solve problems efficiently is key to ongoing management.
- **Tenant and workload administration** – Centralized management of tenants and workloads enables administrators to monitor products and licenses assigned to individual tenants.
- **User & group management** – Users and groups should be managed on an ongoing basis to ensure the appropriate rights are assigned. Old groups should be archived when not in use.
- **Adoption & productivity management** – You can help users get the most out of the Microsoft 365 suite of services by focusing on adoption and productivity management.
- **Dashboard reporting** – Microsoft 365 dashboards enable you to interact with data and run customized reports to monitor users, usage trends, mail flow, etc.
- **Compliance & policy management** – All organizations should establish internal usage policies and then enforce compliance with those policies. Many businesses and organizations also must heed regulatory compliance requirements.



- **Security, identity & governance monitoring**
  - Ongoing monitoring of security within apps and connected devices is required for system protection.
- **Integrations** – Microsoft 365 integration possibilities abound, but each integrated application requires additional administration and monitoring.
- **Endpoint security** – Because each endpoint is another entry point into your network, strict endpoint security is mandatory for maintaining system health.
- **Backup services** – The robust functionality of Microsoft 365 means a lot of data is wrapped up in its applications. A trusted backup method – and sometimes multiple backups – is a must.
- **Incident Triage** – Microsoft will detect and alert administrators to several types of incidents that need to be triaged for assessment and action.
- **Incident Escalation** – Once incidents are triaged, they can be escalated via incident response workflows within Microsoft 365.
- **Alert Monitoring** – Microsoft 365 delivers a variety of alerts that require attention, although some are not as urgent as others. You can view alerts by severity, type, category and date and then evaluate alert trends over time to identify problem areas.
- **Configuration Management** – Ongoing configuration management is necessary to confirm that all apps are automatically updated. This ensures quality system performance and protection from security risks.



## What Are the Challenges in Managing Microsoft 365?

When you are preparing for a Microsoft 365 migration, here are a few challenges you should be aware of:



### Tracking & Managing Licenses

When it comes to licenses, companies must:

- assign employees the correct license for their job function
- minimize the number of inactive licenses
- renew active licenses

It seems straightforward but can be tricky for large and decentralized businesses. A common issue is assigning new licenses to new employees but failing to shut off licenses for employees who leave.



### Scaling

Companies that grow organically or by merger and acquisition often experience challenges in scaling Microsoft 365. Whether you have a single large tenant or multiple smaller tenants, visibility into licensing and permissions is the primary culprit.



### User Adoption

User adoption is essential for the success of Microsoft 365, especially when migrating from an on-premises solution. The rollout and adoption processes can be challenging for an already-taxed IT department.



### Security

Defending against increasing cyberattacks targeting Microsoft 365 can be challenging for IT teams. Constantly monitoring the ever-changing cyberthreat landscape is a full-time job. And while the multiple layers of security offered by Microsoft 365 are highly beneficial, it can be difficult to manage the various settings properly.



### Why Use Managed IDR with Microsoft 365?

A managed inbox detection and response (IDR) security solution provides professional evaluation and handling of suspicious emails reported by users — right from the inbox.



#### Efficiently Report Suspicious Emails

Inbox Detection and Response gives users a faster way to take the guesswork out of questionable emails by reporting them with a single click right from their inbox.



#### Quickly Validate Reported Emails

Using advanced technology and human security experts, reported emails are validated and either returned or removed within minutes.



#### Identify & Remove All Malicious Emails

Reported emails deemed malicious are removed from your domain, if the user was a recipient. Eliminate the opportunity for other users to fall victim to phishing attempts.

A managed IDR solution is a simple Outlook plugin extension to stop phishing emails since standard email filters are not fool-proof.

## **PART 5:** **What Should You Look for in a Microsoft 365 MSP?**

The right managed service provider (MSP) can provide reliable support and specialized expertise to manage the migration and the day-to-day administration of your Microsoft 365 solution suite.

### **What Are Key Considerations in Selecting an MSP to Manage Microsoft 365?**

Key considerations when deciding to use an MSP to manage your Microsoft 365 platform include:

#### **Portfolio Breadth**

Can the MSP handle the extent of your Microsoft solutions and offer expertise and capabilities regarding the other systems and applications your Microsoft solutions touch?

#### **Pricing Models**

Does the MSP offer pricing models adaptable to the size and needs of your business? Is spending predictable and easily forecast?

#### **Service Levels**

Can the MSP offer 24/7/365 fully managed services? Can they provide you the flexibility to co-manage the solution or operate on an on-demand basis? As your business scales, can your MSP adapt to meet your requirements?







### **Certifications**

Does the MSP have Microsoft certifications that are valid and current? What about security certifications? Are they committed to renewing certifications in a timely manner as the technology evolves?

### **Size for Scale & Influence**

Is the MSP large enough to handle your business needs as it scales and get technical assistance from Microsoft when needed?

### **Geographic Availability**

Can the MSP provide the support you need where and when you need it? Does the MSP offer nationwide coverage to grow with your business as you expand into new markets and meet the IT needs of multiple locations?

### **Technical Expertise**

Does the MSP have a comprehensive understanding of the ins and outs of Microsoft 365? Are they certified Microsoft Partners? Is their expertise wide-reaching enough to understand how Microsoft 365 interacts with other solutions, such as your communications system?

### **Technical Infrastructure**

Does the MSP have the right combination of tools, platforms and solutions for your business? Does the MSP have its own network operations centers (NOCs), security operations centers (SOCs), remote desktop access for instant support or labs for testing updates before applying them to your live environment?

## **PART 6:** **Why Choose TPx for Microsoft 365 Migration & Management?**

Partnering with TPx for Microsoft migration and management ensures a smoother transition and seamless day-to-day management. TPx's Microsoft experts can help your business realize the benefits Microsoft 365 offers and provide exceptional support.

### **What Microsoft 365 Migration & Management Services Does TPx Offer?**

TPx has extensive experience building and optimizing Microsoft 365 capabilities for businesses large and small. The team can spearhead your migration and day-to-day management, ensuring the solution suite is customized to drive the highest productivity possible. TPx also conducts ongoing checks and optimization practices to assess the platform's success and suggest changes.



**Here's an overview of the services TPx offers:**

#### **Design**

- Determine the most appropriate Microsoft 365 licenses.
- Plan the optimal service configuration to maximize collaboration, productivity and security.
- Develop and document the implementation and migration plan.

### Assess

- Review your collaboration, productivity and security requirements.
- Evaluate available Microsoft 365 license options.

### Implement

- Create a new Microsoft 365 tenant and apply new licensing.
- Transfer/update existing Microsoft licensing and perform a tenant health check.
- Configure Microsoft 365 tenant and application settings.
- Migrate existing users and data.
- Implement group permissions, policies and security settings.

### Support

- License billing management.
- Technical support management with escalation to Microsoft for Platform issues.
- User administration, including moves/adds/changes of users, mailboxes, groups and distribution lists.
- Managed cloud backup with unlimited cloud backup for Exchange, OneDrive/SharePoint and Teams.

### Optimize

- Manage multifactor authentication.
- Manage mail flow and security rules.
- Manage policy and alert settings.



## What Are the Benefits of Partnering with TPx for Microsoft 365 Migration & Management?

Partnering with TPx for Microsoft 365 migration and management services offers a range of time- and money-saving benefits, including:

### A Seamless Transition

Our engineers have performed hundreds of migrations using our proven migration process, so your organization will benefit from a smooth and efficient transition.

### Best Practices

TPx will configure your Microsoft 365 environment to ensure it's built right and optimized to improve employee productivity.

### Enhanced Network Security

Microsoft 365 contains many built-in security enhancements and tools. TPx will configure and manage these according to recommended practices and individual customer requirements.

### Ongoing Cost Savings

TPx not only offers pricing adaptable to your particular business and migration, but we also oversee license billing management to prevent overcharges or penalties.

## Optional Complementary Services

### Hybrid Backup & Disaster Recovery

Combine local and cloud infrastructure to boot an entire office on the local device or hybrid via the TPx secure cloud and be back up and running as fast as the images can boot. In a crisis, TPx makes it easy to return to normal operations.

### Extensive User Security

TPx provides enhanced Security Awareness Training and Managed Inbox Detection and Response (IDR) to empower employees to be part of the solution and protect your business from phishing attacks.

Case Study:

## Exchange Server Migration

See how TPx rescued a manufacturing company's IT resources from constant email headaches by migrating to Microsoft 365.

[LEARN MORE](#)



## PART 7:

# Why Choose TPx?

You have enough business challenges. Partnering with TPx supports your Microsoft 365 environment so you can focus on core business goals. At TPx, we have the products, services, experience and certifications to keep your productivity solutions running smoothly and safely.



We solve the biggest IT issues – cybersecurity, connectivity and collaboration – under one umbrella.



Our buying power enables us to customize solutions for maximum effectiveness within your budget.



We have 120+ certifications across 60+ competencies, like CompTIA, Cisco, Fortinet, AWS, SMC and more.



We have the IT solutions, staff and experience you need for effective results within your budget.



We provide enterprise-class and 24/7 support for ongoing, proactive support tailored to your business.



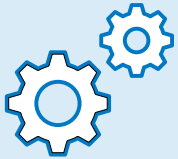
We modernize your IT, connectivity and communications while minimizing your risk from cyberthreats.



With 18,000 clients in 49,000+ locations, we're big enough to get the job done and small enough to be agile.



We provide enhanced User Security to protect your data and business from cyberthreats.



## TPx Is Your One-Stop Shop for Managed IT & Collaboration

### ✔ Microsoft 365

TPx will move your business into the Microsoft 365 suite for secure cloud productivity and manage your environment to ensure security, availability and performance optimization.

### ✔ UCx with Webex

Replace disparate apps with a single, unified communications solution for optimal collaboration supported by advanced technology.

### ✔ Business Internet

You need to seamlessly connect with customers, locations, suppliers and markets. We can help you do it in an easily managed, reliable and cost-effective network. At TPx, we bring the connectivity that's right for your business and weave it into a comprehensive IT solution.

### ✔ SD-WAN

Rely on guaranteed cloud communications performance without the deployment headaches and higher cost of traditional WANs.

### ✔ Next-Generation Firewall (NGFW)

The firewall is the first line of defense in protecting your business from Internet-based threats. Next-generation firewalls block today's advanced threats while providing secure access, visibility and control to help your business be more productive.

### ✔ Unified Threat Management (UTM)

TPx ensures UTM features such as web filtering, antivirus, application control, intrusion prevention and VPNs are properly configured, monitored and maintained.

### ✔ Endpoint Management & Security

TPx helps keep your servers and workstations healthy, secure and performing optimally. Our Endpoint Security service leverages remote monitoring and management (RMM), patch management and security. Together with expert support personnel and security analysts, we provide an "always-on," best-in-class, 24/7/365 service.

### ✔ Security Awareness Training

Users are your last line of defense. The more they know, the less prone they are to be victims of phishing scams or other security incidents. Our service includes monthly phishing simulations and Security Awareness Training courses with automated reporting to track your results.

## TPx Is Your One-Stop Shop for Managed IT & Collaboration (continued)

### ✔ **IDR**

A key user security service provided by TPx is inbox detection and response (IDR), which empowers employees to make good cybersecurity decisions and become part of your security solution.

### ✔ **DNS Protection**

We protect systems and users from malicious websites using leading DNS Protection software. Windows devices are protected both on the corporate network and while traveling. Network-based DNS protection covers BYOD, guest wireless, and non-Windows devices to deliver comprehensive DNS security and reduce your risk of attack.

### ✔ **Managed Detection & Response (MDR)**

Discover, prevent and recover from cyberthreats faster. TPx's MDR helps you identify more threats, reduce attack dwell time, and proactively mitigate attacks. We offer managed detection and response for both firewalls and endpoints.

### ✔ **Backup & Disaster Recovery (BDR)**

We help organizations quickly recover from system downtime and data loss caused by cyberattacks, human error, system failures and natural disasters. Using advanced hybrid local/cloud technology and skills management resources, TPx delivers a turnkey BDR solution that will meet your recovery objectives.

### ✔ **Ransomware Detection**

All backups are scanned for ransomware and when a ransomware footprint is detected, you can roll back your systems and make it as if it never happened.

### ✔ **Security Advisory Services**

TPx advisory services provide comprehensive security consulting that can help improve your security posture and protect your business. Our services comprise a cybersecurity gap assessment, network vulnerability and penetration scanning, network security assessment, wireless security assessment and ransomware readiness assessment.



## ABOUT TPX

TPx is a leading nationwide managed service provider (MSP) focused on the success of small and medium businesses (SMBs) with approximately 18,000 customers in more than 49,000+ locations across the U.S. For more than two decades, TPx has offered managed services and solutions to help customers across every business sector address the growing complexity of their IT environments.

For more information

