AP·LOGIC™

Focused Teams and SharePoint Engagement

Process & Client Time Commitment

Phase 1: Analysis

AP Logic provides 2 reports: One covering people and one for tech.

- The "People" report is our focus survey, an example of which is attached.

- The "Tech" report is the MS Tenant Snapshot which is also attached. It details the state of the Microsoft SharePoint sites and data from the client's Microsoft 365 tenant only – it doesn't cover data on the file servers and on personal OneDrives – that data we get in the next phase.

- There is then a 45-60 min. meeting to present, discuss and plan for the workshop.

> **Client Time Investment:** Project Sponsor and any invited key execs show up for the Survey analysis and presentation of the tenant challenges. 45-90 mins.

Phase 2: Reboot Workshop

- The AP Logic consultant meets with the Client's project sponsors and/or exec team to identify the best participants for the workshop – typically department leaders/directors, sometimes individuals one level up or down.

- Each workshop participant will meet with AP Logic for a 20-min 1:1 interview with our Business Analyst/Sr. Consultant prior to workshop.

- All nodes from the file servers and other file repos are exported into AP Logic's Paradigm Framework software for Teams architecture and migration. The client participates as AP Logic identifies these, but for the most part, it's an automatic process. We just need a little input from them on the common areas and purposes of the legacy file repos as they exist today.

- During Workshop:
  - Education about Microsoft tools and real-life use cases, as applied to their company
  - Presentation of sample structures for Teams and SharePoint
  - Develop the new macro structure (image attached-not the same that we use in the workshop though): Teams/SharePoint sites, Team owners, Team invested parties, and outline permissions at a high level (EG: We only want a subset of the finance team in payroll, for example).
  - Map the macro legacy repo properties to the new teams – these will not need to stick – it is a preliminary allocation that will be adjusted by each team.
  - Define Team Communications Culture:
    - Approximate file retention, naming and tagging policies
    - Notification Etiquette
    - Email usage
    - External/internal sharing
    - Plus more

> **Client Time Investment:** 3.5 - hours (average) dedicated to the workshop; 20 mins dedicated to each participant for the interviews.

Phase 3a: Individual Team Architecture

Each Team and owner, as defined in the above workshop, meets with AP Logic consultants for a series of 45-min online meetings. During these meetings:

- New channels and file folders are architected in the Paradigm Framework rapid prototyping tool and defined for each team to the detailed level.

- Permissions defined for each team and private or shared channel.

- Teams' participants educated on Teams and SharePoint fundamentals. Teams administration education comes later prior to migration.

- Permissions levels are defined at team level and channel level for private and shared channels.

- Files and folders from legacy repositories are mapped using the Paradigm Framework mapping and allocating tool. They are mapped into the new structure for channels and folders. Files and folders can be allocated to other teams at any level. *EVERY FOLDER AND FILE* will have a new home unless the client designates individual folders to be self-migrated.

- This is not laborious: on average, **our clients archive 90+% of their legacy content**. The process is driven by simplicity and focus.

- These are 45-min meetings and there are typically several per team with some homework assigned, over the course of a few days or weeks. This is the backbone of the engagement and includes education and migration mapping for all files and nodes.

Client Time Investment: Team owners or their delegees (often administrative types) meet with us to work through mapping and archiving. We can allow the client to operate semi-autonomously, or guide them through each decision; their choice. Meetings are limited to 45-mins for focus and may comprise 2-3 meetings plus some follow up.

Phase 3b: Reconciliations, Migration & Final Education

This is where we prep the client for migration/implementation. We'll reconcile any differences between team decisions with the client's project sponsor. (EG: If one team and another are contradicting one another, then the differences are reconciled).

Straggling files or personal repos may be staged into new locations just prior to the move. We typically pre-migrate large chunks of data, then run differentials on the day of migration. A formal plan for project migration by department is developed, final education dates for each team (we train individually with teams as their data use cases are specific) and then commit to a date/time and rollback plan. We've never had to rollback but there is a plan.

Pre and post migration education along with physical restructuring Teams and SharePoint, along with migration from the legacy file properties in accordance with the maps provided by the client. Education sessions are also recorded and made available to all team staffers. Additional demos are available although truthfully, few staffers watch training videos on their own, so we do not emphasize these, but they are available!

Client Time Investment: Team owners: 1-2 hours for reconciliations. Be ready for a little extra time the day after migration.

Phase 4: Optional Support

AP Logic assists clients as they refactor teams and channels along the way as their business grows. We educate, provide helpful tips on upcoming Microsoft tools and review department usage with each Team owner. On a quarterly basis, we provide the client with new reports about their infrastructure and a quarterly Teams Review meeting with specific Team owners. New tools like CoPilot, Loop and more can be setup and included as we progress, but the foundation is clear data storage and simplified communications.

Client Time Investment: One meeting every quarter or so for department leaders and some staff. If they want training, typically 30-90 mins involvement for those requesting that.