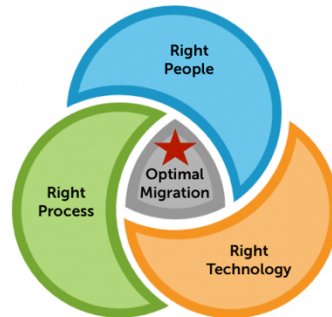# Tips from the Trenches for a Successful Cloud Migration

By: Lisa Stone, Director Enterprise Content Management, Fireman & Company
Dan Anderson, CEO, SeeUnity

It's no secret the trend to the cloud is gaining momentum. Adoption of cloud-based solutions across firms of all sizes was up an average of 68% in 2018 in comparison to just 51% in 2015, according to ILTA's 2018 Technology Survey results. Not surprising are three high ranking reported barriers to cloud adoption: Cost, client restrictions, and integration and expandability. This article touches on the considerations that most affect a successful transition to the cloud.

Migrations are well known for being rough, but thorough scoping and planning go a long way toward helping firms make the move as smoothly as possible by reducing unexpected surprises and costs. Choosing experienced partners and vendors, coupled with detailed planning, will deliver a new environment set-up for efficiency and growth. The end goal is to optimize workflow and stay competitive.

Technically, migrating data to the cloud comes with a unique set of challenges. For example, taking your Document Management System (DMS) to the cloud requires a different approach than a traditional database migration, as everything must go through the cloud's API. This is where partnering with a seasoned integration services provider and utilizing a proven migration tool with appropriate capabilities can make a big difference in the success, duration, and cost of your project.

Setting the Stage

Your organization has decided to take their DMS to the cloud. Now what? There are a number of key considerations to set the foundation for the rest of the project.

- Partner with an integration vendor who not only has expertise in the cloud platform but who will also give you honest feedback on the different platform choices. Your integration partner should be able to guide you around the various options without bias and expose all the positives, as well as the warts, of the products. Ask peers and counterparts at other firms about their experiences and the keys to their success, as well as what challenges they met.

- Be sure to have the support of your firm's leadership. Involve them in the purchasing decision by comparing the top venders in the cloud DMS space. Be sure to demo the product to them and highlight the pluses and minuses of each vendor you review.

- Before selecting a cloud provider, find out up front if your applications (apps) stack is compatible with that product. Have your application development team create an application compatibility

matrix outlining all of the firm's third-party apps that integrate with the DMS and confirm they are compatible with that cloud's latest release.

- Make a plan to ensure user adoption with communication, learning strategies, reinforcement, and enablement strategies. Some firms choose to partner with vendors that specialize in this space.

Next Steps - Planning

Forming a solid plan to execute the migration will help avoid critical issues that cause loss of revenue for the firm, such as inaccessible email or documents during the migration. A knowledgeable integration services provider can provide guidance here.

- Current state analysis and discovery: Review how data is actually being managed. Are there other systems that tie into the DMS such as Invoicing Systems, Enterprise Search, Security, and Ethical Walls, etc.? This is an opportunity to optimize content, identify and streamline processes.

  - Clean up content prior to migration to increase its value to users.

  - Utilize an integration services partner with expertise in data discovery if the resources are not available in-house.

  - Consider how the new cloud environment should be set up to optimize features and improve user workflow. User adoption starts here with input and analysis on how they use content.

  - What will the firm's new knowledge management and records management processes entail?

  - Determine the appropriate apps for your situation. Existing apps may need to be re-platformed or new apps purchased for compatibility with the cloud platform you choose.

- Consider the implications of new cloud features and related supports. Understand key differences presented with a cloud environment:

  - Access content through UI and API

    - How will IT access back-ups through the cloud vendor? Do you still need back-ups if the cloud vendor is already backing up the data?
    - What does the cloud provider's disaster recovery process include?

  - Authentication

    - Plan for a Single Sign On (SSON) solution that is compatible with your cloud DMS choice. The ability for an individual to launch the cloud app without having to login should be the standard. The new cloud DMS deployment could be perceived negatively if attorneys, staff and other professionals have to log on everyday and deal with multiple usernames and passwords. Most cloud DMS' support Security Assertion Markup Language (SAML) 2.0 which you may already have in place in your enterprise for other SAS apps. Confirm that your third-party apps will work seamlessly with a SSON authentication method. Some are still struggling with this.

  - Encryption of stored data

- Balance the desire for user mobility and the requirements of your clients. Create a remote access plan based on these security requirements while still providing the attorneys, staff, and other professionals options related to mobility.

- Decide how you will measure project success and communicate this to all stakeholders. These value indicators can be related to new opportunities, cost avoidance, productivity, operations, or business agility, for example.

Implementation and Migration Tool Considerations

Selecting the proper migration tool(s) depends largely upon the firm's needs and goals. Below are some points to consider:

- Type of migration

  - A cloud-based source system requires a solution capable of connecting API to API level with a product, such as Velocity Content Migration.

  - An on-premise or legacy DMS source system can be migrated directly via API or by a local staging database process and an import tool.

- Minimize Disruption – Maximize Productivity

  - The right tools can be helpful here. The use of secure delta syncs allows for continued productivity and a flexible cutover date.

- Data validation and metadata mapping

  - Choose a tool that is capable of "seeing" the content in the source system, allowing you to identify issues for clean-up, and map metadata for migration (e.g., corrupt data, zero-byte files, missing metadata, etc.)

- Data transformation

  - The ability to transform data during migration can be very valuable. Transforming content prior to migration means the new system will be ready to go for users at cutover, rather than needing extensive post migration reconfiguration. Items that can be transformed during migration include:

    - Document classification mapping
    - Client/matter numbers that require padding or other changes
    - Clean-up of any data
    - Consolidation of databases
    - Metadata mapping and clean-up
    - Re-file flat file documents to workspaces

  - Products with out-of-the-box solutions, like pre-configured templates and optional scripting for custom requirements, will offer the most flexibility and time savings, especially when dealing with data transformation.

- Data verification, testing, error reprocessing, and rollback

- o The ability to verify data, test (including user acceptance testing), reprocess errors, and roll back incorrect data will save time and effort on the target cloud system end.

  - o Detailed reporting can assist the migration team, giving them full project oversight and control.

- Speed of migration

  - o Migration tools that address performance factors, such as document threading and scalability, can be useful in speeding up the whole process. This is where it's critical to have a good relationship with the service vendor. Under the right circumstances, the cloud vendors are usually willing to take measures to increase migration speeds where possible.

It's important to continue user acceptance testing, training, and communication efforts during implementation for successful adoption results.

Post Migration

Further testing and adjusting will help optimize the cloud environment for users' workflow, ensuring a higher return on your new investment.

In Conclusion

A full-scale content migration to the cloud may seem daunting at first, but with the assistance of an expert integration services provider utilizing the appropriate tools, the project will be more manageable and cost effective.

Observations from the Field

- The attitude you bring to the project is key. A DMS migration is a large and important project in any law firm. The firm's IT staff needs to have a strong focus, be present at meetings, and pay attention (these are not the meetings where one can multi-task). Issues can arise that are mission critical, causing down time or inaccessibility for the attorneys, which equals non-billable time.

- Be sure IT staff understand and use the new cloud product prior to go-live. Pilot or go-live is NOT when the IT staff should be using the product for the first time.

- Prepare a long-term user adoption strategy with your integration partner or trainer. A new DMS is a significant change to how the attorneys work. Expecting them to learn all its features in one training session or during the limited floor support you provide is not realistic. Create a long-term plan where communication and additional training is available for many months post go-live. Use different tools to get this information to your users without pulling them away from their billable time.