

# MSP Azure Migration Program

## Master Engagement Plan

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## Master Engagement Plan / Checklist

This Master Engagement Plan and Checklist is intended to be the (typically) sequential guide utilized by a Managed Services Provider (MSP) partner to take each of their customers through a structured cloud migration journey to Azure.

### Migration Resources Available for the Partner to Review and Leverage

These resources characteristically only need to be reviewed by the partner migration team before their first customer migration engagement, and are likely not applicable for subsequent customer engagements. This is one of the recommended ways of approaching a migration effort, and if the partner has their own tried and tested methodologies and checklist, they can skip this document. These are primarily background resources partners should leverage in preparation for the MSP Azure Migration Initiative:

- Review the MSP Azure Migration Onboarding Guide and Kick-off Deck that goes through the program goals and expectations (gives and gets) of the MSP Azure Migration Initiative.
- Review the "Setting the Scene - Leveraging the Cloud Migration Playbook" guide that provides relevant guidance on key sections of the "Cloud Migration Playbook". This playbook has useful information and best practices for partners to leverage in building a successful Azure Migration practice. Your program management and practice development teams should read this playbook.
- Use the "Engaging the Customer - Azure Migration Program Partner Walking Deck" as a template and include partner specific customizations to pitch the migration effort/program to your customers.
- Understand the "Migrating the First Workloads – Crossing the Chasm Part 1" concepts that will help partners prepare for migrating initial workloads.
- Review the "Migrating the First Workload - Architectural Design Consideration Guide for Initial Workloads" document to migrate the first couple of simple workloads to Azure.
- Understand the "Planning Discovery and Assessment - Crossing the Chasm Part 2" document that has key concepts for discovering and assessing the customer's remaining workloads via automation.
- Get trained on Cloudfunder tools and learn how to leverage it to discover and assess additional (remainder) of the workloads. Refer to the training videos or attend online training sessions to get trained.
- Learn how to setup and configure Azure Site Recovery (ASR) by reviewing the ASR setup guide documents and links in the "Migrating the Remaining Workloads" section of the support portal.
- Refer to the migration documents (based on your scenario) in the "Migrating the Remaining Workloads" section to understand how best to migrate specific workloads.

- Use this Master Engagement Plan and the below Checklist to establish a structured and successful migration experience with customers.

## Checklist for Customer Engagement

The following are typical checklist items specific to each customer engagement:

Customer Name: \_\_\_\_\_

- Initial meeting with the customer to share the goals/benefits/expectations of the MSP Azure Migration program. Agenda items for the meeting include:
  - Introduction of the Stakeholders to the Cloud Migration Initiative (both customer and partner participants).
  - Presentation by the Partner to help the customer understand Microsoft Azure – Why Microsoft? – Benefits of Migrating to the Azure Cloud.
  - Review of the MSP Azure Migration initiative and the benefits to the customer.
  - Review of the customer commitments as part of the Initiative (to move 20 VMs to Azure by June 15, 2017).
  - Brainstorming and selection of the initial 2 workloads (3-5 Virtual Machines) that can be quickly and easily migrated to Azure (partner should make sure they have internally reviewed the “Setting the Scene – Successful Migration Strategies” guide to influence the selection of a workload (or workloads) that will provide quick and smooth initial experiences in migrating to Azure.
  - Identification of subsequent 3-5 workloads (or equaling to a total of 20 Virtual Machines that’ll be targeted for migration to Azure) that can be migrated, presuming the initial workloads are successfully completed.
- Creation of a Statement of Work (SOW) and identification of goals and timelines for migrating 20+ VMs to Azure.

### First Workload Migration

- First workload discovery and planning session where the partner assesses the first workload, understands workload dependencies and confirms that the workload is a good candidate for the first migration experience to Azure.
- Planning and preparation review of the first workload and selection of the date/time to migrate the first workload to Azure (see “Crossing the Chasm – Part 1 of 2” document for first and second workload migration guidance).
- Implementation of any pre-requisites prior to first workload migration.
- Migration and Testing of the first workload to Azure (see “Architectural Design Consideration Guide for Initial Workloads” for technical migration guidance).
- Successfully switch over workload to Azure once testing and validation are complete.

- Knowledge sharing with the customer on how Azure is handling the operation of the first workload, considering how the customer “normally” operates the workload. If the customer has all services handled by the partner (backup, monitoring, maintenance etc.), then this knowledge sharing is simply a confirmation from the partner to the customer that the migration of the workload to Azure has been completed and everything is “working just fine”. If the customer shares responsibilities in the maintenance and management of servers and services, then the partner would cross-train and share experiences of how the customer will participate in operational activities of workloads in Azure.

### Second Workload Migration

- Planning and preparation review of the second workload, and the creation of the migration plan for the second workload to Azure.
- Implementation of any pre-requisites prior to second workload migration.
- Migration and Testing of the second workload to Azure, including cut-over.
- Additional Knowledge Sharing and customer acceptance of the migration work completed to date.
- Evaluation of the success of the initial couple workloads, and initiation of the planning and preparation of the migration of the Next batch of workloads to Azure.

### Subsequent (Remaining) Workload Migrations

- Planning and preparation review of additional workloads -- to achieve 20 VMs total targeted to migrate to Azure (see “Crossing the Chasm – Part 2 of 2” document for subsequent workload migration guidance).
- Use the Cloudamize tool on 20-40 targeted servers to gather operational data on the servers.
- Confirm the viability of migrating the servers to Azure by assessing and scoring the workloads.
- Implementation of any pre-requisites prior to subsequent workload migration (see “Architectural Design Consideration Guide – Advanced Networking Scenarios” document for supplemental guidance).
- Migration and Testing of the subsequent workload to Azure, including cut-over.
- Additional Knowledge Sharing and customer acceptance of the migration work completed to date.
- Evaluation of the success of the migration of the first 20+ VMs, resolve any outstanding issues and gain customer acceptance for the work completed.

### Additional (Potential) Azure Implementation Services (optional)

- Consider the implementation of Azure Backup that would involve the installation of an Azure Backup agent and backup a couple workloads.
- Consider the implementation of Azure Site Recovery to replicate a workload for disaster recovery to Azure.

## Repeat the Checklist for Each Client Engagement

- Proceed with Client Engagement for a total of 5 customers, following the Engagement Plan and Checklist for each customer.

## MSP Cloud Migration Initiative Wrap-up

- Upon completion of 5 customers each with 20+ VMs migrated, file for the completion of the MSP Azure Migration Initiative for partner funding.
- Complete the MSP Azure Migration satisfaction survey.

## Post MSP Cloud Migration Initiative Partner Services

- Partner to engage with the customer on more detailed and structured planning and migration of Mission Critical and complex business applications to Azure. Leverage output data from Cloudamize on workloads that were not migrated in the initial 20 virtual machine migration effort as potential work for the partner to continue to scale the migration process.