Managing Migrations: A Panel Discussion

HIGHLIGHTS

- **Interested in best practices for the effective migration of platforms?** Debbie and Matt shared their take and experiences on 4 best practices.

- **Curious to hear a step-by-step beta testing plan?** One member shared her 4 stage process, led by the help of a company partner.

- **Wondering about what the Panelist's would do differently in retrospect?** Between Debbie and Matt, 5 hindsight revelations for their migrations were discussed.

SPEAKERS

Matt Laurenceau (BMC Software), Debbie Kwan (Canadian Partnership Against Cancer), and Sean Marlin (TheCR)

COMPETENCIES

Tools, Strategy, Metrics and Measurement

MATURITY PHASES

CMM2, CMM3, CMM4

THECR NETWORK

OVERVIEW

- **Background Debbie Kwan.** Debbie is the Internal Digital Lead with the Canadian Partnership Against Cancer. They are a fairly small organization with 130 people. They work with the Cancer Control Community across the country to implement the Canadian strategy for cancer control.
  - Debbie is a team of one. She is part of the Communications Team and is responsible for their internal digital tools.
  - These are internal communities. They support the communication, collaboration and connection among staff.

OVERVIEW

- Part of the package of communities includes their intranet, which is the official source of information and news.

- They have informal discussion forums.

- They used to be on Igloo and migrated to Microsoft (MS) 365, which includes MS Teams, Yammer and SharePoint.

- They have collaborative spaces, which use MS Teams. However, with MS Teams, Debbie feels that the spaces are now closed off areas for collaboration.

  - Debbie shared that their migration process has been a bit muddy. Their intranet was on Igloo, which existed before Debbie's time. It was a way for people to get information. Igloo had a lot of interactive features, but they didn't know how to support the adoption of those features. Consequently, they were never really used.

OVERVIEW

- **Background Matt Laurenceau.** BMC Software is a 40 year-old software vendor. They have moved from mainframe to distribution to the Cloud and DevOps, etc. to help customers best manage their IT infrastructures and businesses. In order to do that over the last 40 years, they had to stay highly relevant. More than 20 years ago, they traded a digital customer experience to a collaborative experience. Then it morphed into what is now called BMC Community with customers, authors and BMC employees. They help each other succeed with their solutions.

  - Matt was notified by the vendor who owned his previous platform – Jive – that they were about to shut down. That left Matt with only 13 months to migrate a 20 year community to Salesforce. It was an insane time.

OVERVIEW

- The goal was to move people in their journey from being a prospect and looking at information within the community to becoming a customer, becoming on-boarded and then renewing. It's a product community that touches sales and marketing and product.

- Ownership of the community happens to be under marketing, but Matt's best friends are in the product side/ customer success organization. It's a global community that touches customers and prospects and many visitors, too. They have about 17 times more visitors than logged-in members each month. They need the logged-in members, but visitors who enjoy the content helps with their success.

  - Matt's team consists of 3 community managers and an architect. The team is highly efficient because they are a lean, small team who make things happen.

  - There are hundreds of thousands of accounts/profiles. Most of them are ghosts and/or dormant, but there are probably about 10K active members every month. They attract visitors who may or may not create an account. That's not Matt's goal. Even if they don't create an account, but they succeed, Matt feels that's a win.

BEST PRACTICES

- **Put a team in place to assist with the migration.** Debbie and Matt shared their best practices for ensuring support during the migration period:
  - For Debbie, the main reason they migrated was due to the organization and information technology team that owned much of their platform. They decided to move away from Igloo for cost saving reasons. They were using other Microsoft products and wanted to integrate all of their tools while at the same time reducing costs.
    - As a result of the above, Debbie was temporarily relocated to the Information Technology team to manage the move to Microsoft. It was a cross-functional effort. The IT team was responsible for the migration, so they had to make sure that everything moved and was secure.
    - They implemented a Working Group with many of the different teams and staff members who managed the intranet content, i.e. HR, communications, administration, etc. They were involved with the Working Group to guide them through the process and provide feedback.

BEST PRACTICES

- They also formed an Advisory Committee. They called out to staff across the organization to participate in user test studies. As their main focus was to ensure ease of findability, they created their information architecture. They used the research studies to ensure that they were organizing their information in an intuitive manner in order to avoid past problems. They had different people from various teams take the tests using Optimal Workshops for card sorting and tree sorting exercises. It was a great way for everyone to collaborate and learn how to improve their pain points.

  - The program used to facilitate this exercise was "Optimal Workshop." It is an easy-to-use web-based program. The card sorting and tree testing exercises were critical. Both of these helped them to ascertain the best way to group information for the navigation and show them where to put content as a result.

- Matt also used a cross-functional team. At the beginning of their project, they used an RFP because they didn't know which vendor to choose. When they decided to use Salesforce, it became an IT project. IT would eventually be accountable, but they didn't have experience with Community Cloud or Experience Cloud. Therefore they used 7Summits, an external agency. 7Summits used their expertise to guide the migration from Jive to Salesforce.

  - From a stakeholder point of view, even if it is led by marketing, they had to cooperate very closely with the product teams. It was a huge cross-functional project that had to stand up quickly. They had 8 months to migrate a 40 year-old company.

BEST PRACTICES

- **Learn to work within strict timelines.** Both Debbie and Matt were given strict timelines to complete the migration and shared their best practices for heeding to the deadlines:
  - Debbie was given 6 months to complete her migration. They had heard buzz that they would be moving off of Igloo prior to it actually happening. As a result, they began gathering the requirements beforehand. Even with so many organizational changes and no champions, miraculously they did get a project initiated to gather the requirements for what they wanted to see in their future intranet.
    - When it was announced that they would officially move off of Igloo, they only had 6 months. Their first step was a content audit. They formed the Working and Advisory Group mentioned earlier to do the technical analysis and intranet build within those 6 months. They also had to offer basic training for content publishers. Then came the migration and quality assurance steps.
    - With the tight timeline, they were unable to flush out the full governance model. Therefore, some of the governance was completed after the fact. That meant re-doing a few things and moving content that, in retrospect, did not make sense to be located where it was placed initially.
    - The full training also happened after the launch.
    - Communication and change management was offered throughout the 6 months.

BEST PRACTICES

- For Matt and his team, they followed the lead of 7Summits, who have completed many, many migrations. Prior to the migration, all the ideas, blogs, documents, etc. that were created and customized on Jive required the creation of proper constructs on Salesforce. None of this had been created. They are still continuing with the training because the product was still being finalized. When they went live, they had many issues because they didn't have enough time to train on the product. However, they did it. In Matt's words: *"We did not perform the migration, we survived the migration."* He continually reminded his executive leaders that they would have difficulty with the technology given the time constraints. Fortunately, all the champions and regular community members stayed with them through the migration.

    - Admittedly, the first 3-6 months after the launch was very tough. However, they have since fixed many of the challenges. Luckily, their sentiment scores are similar now to what they were prior to the migration. They are back on track and have a much more powerful and robust platform to show for it.

BEST PRACTICES

- **Solicit feedback prior to and during the migration.** This is a key best practice.
  - Debbie shared that having an Advisory Committee was invaluable. There were representatives from most of the teams that were able to give their feedback on user testing exercises.
    - Communication was also key. As soon as they knew they would be migrating platforms, they put out communication to let people know what to expect. Since users had so many frustrations with the old platform, they were ready for change.
  - For Matt, as soon as they were told that the data center would shut down, he gained a couple of friends. They created the community with community members, customers and partners. It was very important to communicate transparency in choosing the platform.
    - Once they decided on a platform, they began to communicate more broadly and gain a set of champions. As they were building a new product, they were re-configuring a new community that required input from users.
    - The relationship with the champions was instrumental in the success of the migration.
    - They used feedback surveys to know what needed to be fixed and worked diligently to listen to the feedback and make corrections. In their most recent survey, members are much happier.

BEST PRACTICES

- **Consider implementing engagement tactics right after the launch.** Debbie stated that they used a scavenger hunt right after the launch, complete with prizes, to help members learn how to find all the information they needed. This was also used to highlight features that they wanted them to notice. The scavenger hunt definitely helped ignite engagement quickly.

- They also used a "coffee break" engagement tactic. Their intranet is called "Central Perk," which helped them to come up with the coffee break theme. In these coffee breaks, people could sign-in for virtual tours.

- They also did a preview with the executive team prior to launch.

- On the day of the launch, all staff received a link for the intranet. Previously, it was not their default homepage. Now, as soon as they open their browser, it pops up.

LESSONS LEARNED

- For Debbie, one of her struggles is the lack of executive sponsorship for their internal communities. In the past and into the present, their intranet has just been the tool that they use to communicate and connect staff. However, there is a lack of strategy.

- Sean asked Matt and Debbie to talk about their previous platforms and what worked well and what didn't work so well:

  - As mentioned, Debbie used Igloo previously. It was a good platform, but Debbie feels that it just wasn't set up in the right way for them as an organization; it didn't meet their knowledge management needs. They have a records management program that stores many archived documents on the intranet. Whenever someone searched for a file, they would get records from as far back as 10 years ago. That was not the desired experience. That was the largest pain point that they wanted to solve with the migration, i.e. how to make information more findable.

    - Also, the social interactive features of Igloo were not set-up in a user-friendly way. They were buried. The leadership team at the time wasn't open to comments or interaction. That was the second issue that contributed to the lack of social features and findability.

    - On the plus side, Igloo was very easy to manage. Anyone could step in and manage the content and manage the permissions.

LESSONS LEARNED

- Matt migrated from Jive. Jive was the "hell we knew", meaning that people hated it, even though it was a pretty good platform. It did do a lot of things well from a design perspective.
  - Matt had to choose another platform and sell it to community members. They decided against a niche vendor and went with the Salesforce platform. The community product is not that powerful on Salesforce, so they had to add many features and UX and constructs. However, the platform is so large that they can share a lot more content. The engagement from the community created traction for the business. As recapped by Sean, many of the benefits of the shift happened internally in terms of showing ROI vs. anything a member would see.
  - Matt added that all customers who have a Salesforce account now have seamless access to the community.
    - The question was asked about whether or not visitors were automatically converted to contacts in order to access the Salesforce platform. Matt replied that he purposely ignores the Salesforce licensing. Of course, that comes with a price, but that is highly diluted within the BMC brand. People can simply register with auto-provisions.

THECR
NETWORK

LESSONS LEARNED

- Matt explained that Salesforce re-branded Salesforce Community Cloud to Salesforce Experience Cloud, and that is what they are currently using. They quickly learned that the search on Salesforce was extremely limited, so they added Coveo as their search engine. Coveo uses machine learning.

- Debbie stated that they ran 2 duplicate platforms simultaneously to avoid going dark. Matt shared that they went dark for a couple of days, but it highlighted those areas that were in desperate need of fixing. There were several all-nighters for many people around the globe to make sure that these issues were fixed quickly, but it resulted in a better experience for all in the end.

- They do not have a Salesforce administrator on staff at BMC. Matt shared that, instead, they rely on their IT team.

LESSONS LEARNED

- In the first days after the BMC migration, Google traffic dropped significantly. This is because many of the URLs changed. Considering BMC was a 40 year-old company, it was a momentous undertaking that was not compatible with Google. However, it has begun to gain traction again. Even 10 months later, they are still seeing growth.
  - Matt stated that they tried to make the migration as seamless as possible. It worked in most cases, although there were some permissions that did not work exactly as expected.
    - They worked very closely with their champions to avoid negative feedback about what was not working.

LESSONS LEARNED

- The pandemic hit just before Debbie was set to migrate platforms. However, the timing was actually quite good because members were already thirsting for connection. They moved off of Igloo and placed a distinctive notice on the homepage. The first thing members saw when they went online was the discussion forum. Afterwards, when they migrated to Yammer, people were already used to it.

  - At first they weren't going to release Yammer, but with the pandemic they saw the need for connection and rushed putting it up. Engagement definitely increased. However, if it hadn't been for the pandemic, Debbie doesn't know if engagement would have been as high.

  - Keep in mind that Igloo served as every point prior to migration. It was their intranet, their collaboration, their discussion forums, their file management system. With Microsoft, they now use SharePoint for the intranet, Yammer for the discussion forums and MS Teams for the collaborative spaces.

LESSONS LEARNED

- When it came to beta testing prior to the launch, both Debbie and Matt shared that given the short timelines, they really couldn't do extensive beta testing. As a result, they learned many lessons after the launch. The short timeframe in both migrations created limitations that may have been avoided if they had more time for in-depth beta testing.

  - One participant shared that she, like Matt, migrated to Salesforce and also had a very short timeframe to do so. They had a very good partner that led them through a 4-stage process from inquiry to the different sprints for the building to UAT with structured and unstructured testing.

    - With the UAT phase, since it was structured testing, it was designed with different user stories to test, along with how to do it. It involved testing and training at the same time. People were given the opportunity to note their experiences and give their feedback. There was a different topic each week, which helped to control the process.

    - Then they wrote some unstructured user tests that allowed people to go through the system. However, that was towards the end.

    - Then they finalized it with training.

    - They are getting ready to go live soon. However, the more you know, the more you don't know. It has been a challenge. They are live internally, but externally they won't connect their 17,000 contacts in Salesforce to the community until they are ready for the automatic email to go out.

LESSONS LEARNED

- For Debbie's company, they have a button on the homepage that takes a user to their archives. However, if what they are looking for doesn't come up in a search, they put all the evergreen, living files that people need to access on a daily basis on the Internet through SharePoint. Anything that is archived goes to a separate site. That was a major win because it was one of the biggest pain points that they discovered when they did the requirements.

MIGRATING A COMMUNITY

THECR NETWORK RESOURCE BUNDLE

LESSONS LEARNED

- In retrospect, Sean asked the Panelists what they would do differently to gain more support from their executive:
  - Debbie stated that since the migration was led by IT, they didn't really set out a vision for the migration. They still don't have a proper value and purpose for their communities. That has been difficult because there isn't an executive champion for what the community embodies. They've never sat down to create the shared purpose and value. There were so many battles to fight in the beginning, Debbie doesn't know if she could have done it any differently. However, if she could have had someone commit to the vision, it definitely would have helped.
  - For Matt, he would have appreciated more resources, but not necessarily people. Communication breaks down in larger teams.
    - That said, setting executive expectations early on would have been helpful.
    - Matt shared that he learned so many details after going live that would have been helpful to know prior to launch. It could have prevented some of their challenges.
    - Enabling champions early on about the long-term play would have been beneficial if Matt could have done it earlier.