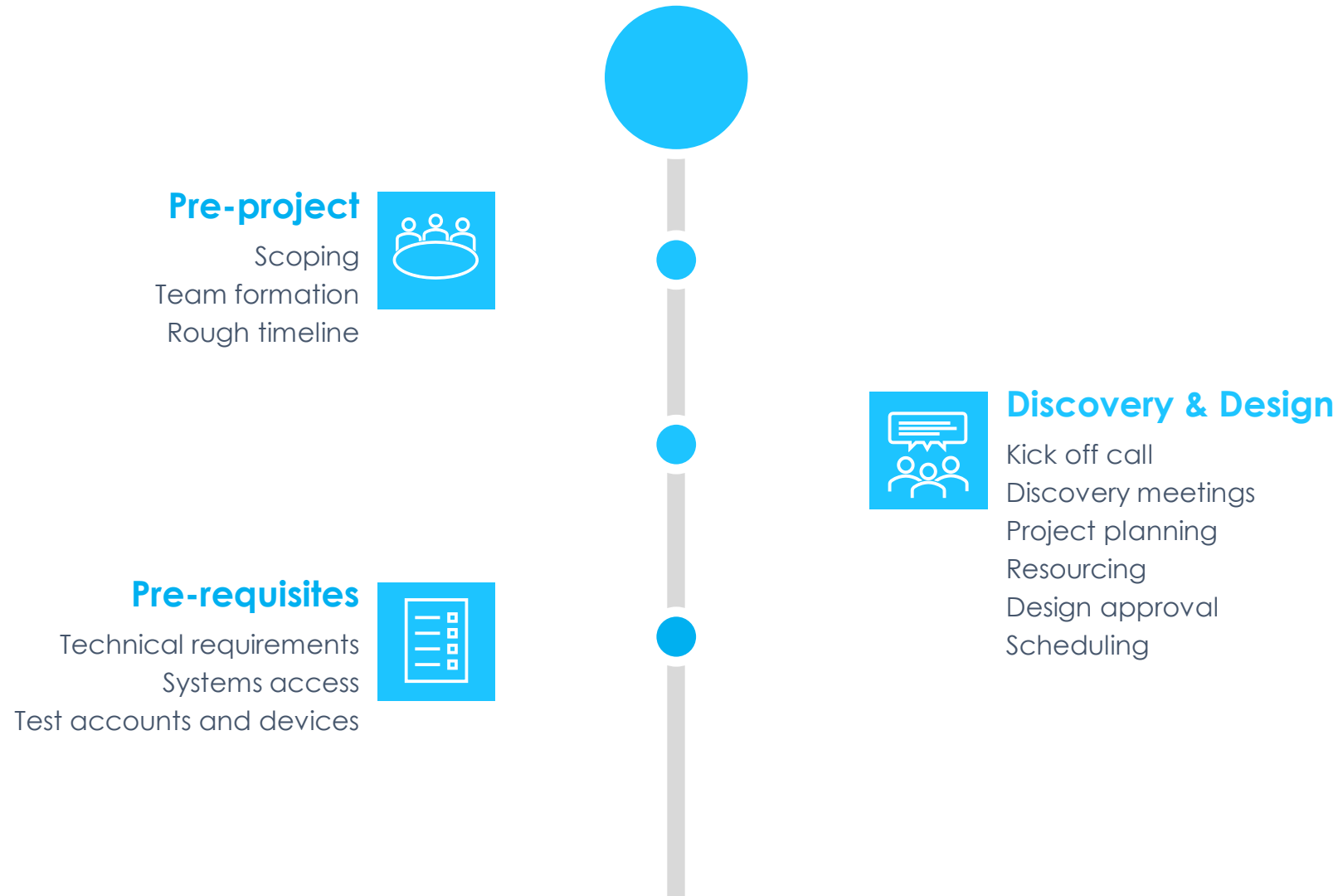# MDM Migration Guide

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Migration Considerations

MDM migrations suck. There are many factors that make migrations intensely painful for the IT team and end-users.

This migration guide is based on Mobile Mentor's experience over 16 years with most MDM platforms.

This guide will help you through the process, act as your mentor, and make your migration less painful.

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Migration Timeline

Pre-project

Scoping
Team formation
Rough timeline

Pre-requisites

Technical requirements
Systems access
Test accounts and devices

Discovery & Design

Kick off call
Discovery meetings
Project planning
Resourcing
Design approval
Scheduling

Build & Implementation

Configuration
Integration
Connectors

Testing & Validation

Test plans
Test groups
Test devices
UAT

Migration Preparation

User and device details
User Scheduling
Communications

Migration

User guides
Support
Knowledge base

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Build **Pre-requisites**

Key Contacts

Identify the **key resources involved in the project** including Project Manager, Technical Lead, Testing lead, User Support Lead, Communications Manager, Network Engineer, and key business stakeholders.

Access

Assign appropriate access to systems and service accounts, including:

- Legacy MDM (e.g., MobileIron, AirWatch)
- New MDM (e.g., Microsoft Intune, VMware Workspace ONE)
- Apple Business Manager Portal
- Samsung KNOX Mobile Enrolment portal (KME)
- Android Zero Touch Portal (ZTE)
- Apple Push Notification Service (APNS)

Devices and Apps

- ✓ Catalogue **all apps and policies you want** to deploy to devices.
- ✓ Captured details of **all the use cases** you want to migrate.
- ✓ Perform an **MDM health check or architecting review** of your new MDM.

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Environment **Build**

01

Create **test users and assignment groups** to validate the build.

Designate a set of **test devices** to validate the migration process.

02

If you need your devices to connect to servers behind your firewall, ensure you have setup your **VPN Tunnel or Proxy solution**. Most endpoint management technologies offer this.

03

Ensure your testing models reality. Test both **internal and external** networks across your use cases to expose issues early. **Virtual LANs** can simulate public networks.

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Testing and Validation

Testers

Perform functional testing to make sure the build is working as designed.
Your test team should include:

- **Technical testers** – to ensure configurations are working as you expect
- **UAT testers** – users to check business critical workflows are working
- **Senior Manager** – a senior stakeholder who can be a champion

Test Devices

Test devices should model each category of device in production, and should be physical devices where possible (not emulators). Remember the point of testing is to break the process and expose defects.

Test Scripts

Mobile Mentor provides test scripts for our clients, and we recommend you use them as well. You will need to **build scripts for your business-critical workflows** and use them to ensure business continuity during the migration. These scripts should be used any time a configuration change is made to your MDM solution.

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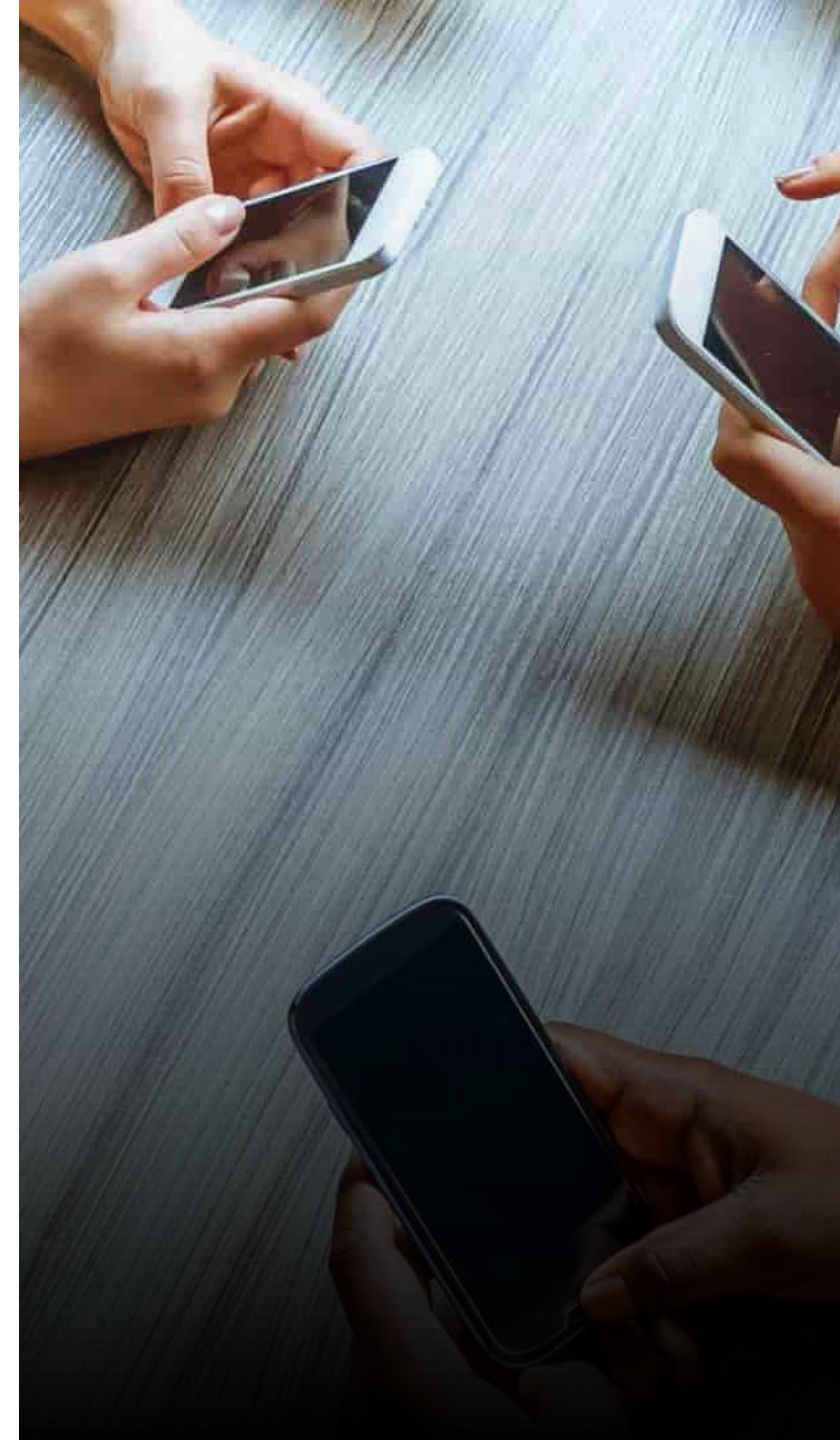
Project Documentation

01

Build a step-by-step guide **to migrate existing devices** to your new MDM. Instructions may vary by OS.

**Test this guide** with real users to ensure it matches your expectations.

02

Build a guide to **enroll newly purchased devices** into your new MDM. Instructions may vary by OS.

Test this guide for each OS to ensure it matches your expectations.

03

Ensure these enrollment guides are distributed to **support staff** and **communicated** to end-users based on their use case and device type.

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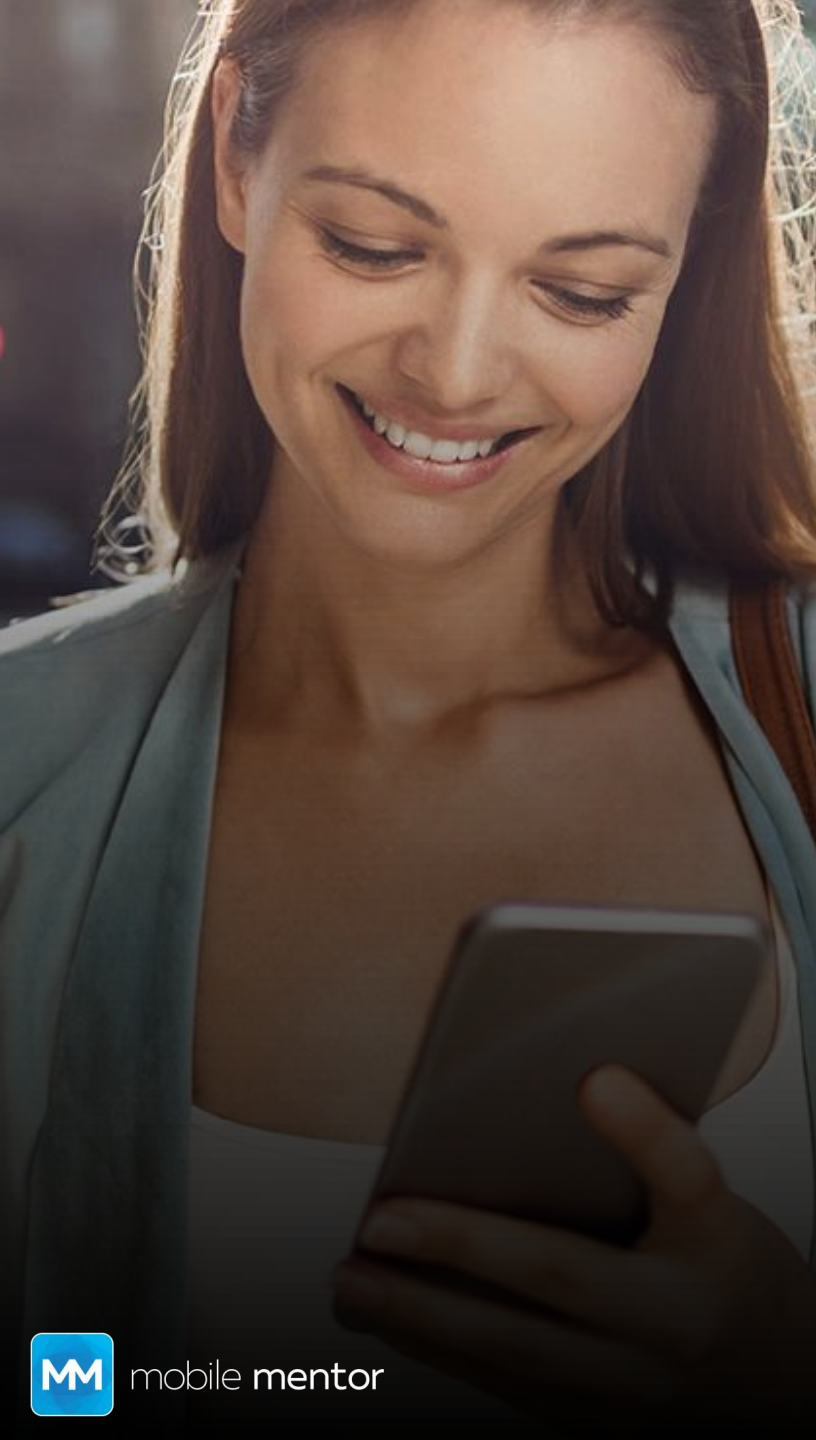
Migration Readiness

User and Device Data

You will need to **gather the following** information for the migration:

- A list of **all users** that will be migrating – email address, office location etc
- Details of **all devices** that will be migrating - serial numbers, SIM cards/IMEI's
- List of **devices to be replaced** (out of support, can't have latest OS, out of space)
- Instructions for users to **back up their data** if their device is going to be factory reset

User Support

Aim to **migrate 75% of devices using the migration guide**. You will also need to **consider migration support** for specific groups of people:

- VIPs
- Shift workers
- Additional needs personnel (e.g. sight impaired)
- Remote and work-from-home staff
- Those on maternity leave, extended holidays, sabbatical, etc.

Scheduling

We recommend the following when scheduling your migration:

- Early migrations are completed in **batches of 50 – 200 devices a day** to start
- **Breaks are scheduled** between each batch to ensure support load is manageable
- **Structured comms** are provided for each step of the migration
- A **follow up plan for stragglers** is in place

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Migration Support

Training

When moving to a new MDM solution, there is **much to learn**. Help your users succeed by delivering training for:
- Helpdesk resources
- Administrators
- Subject Matter Experts (SMEs)
- On-site resources

Knowledge Base & Support

Ensure you have enrollment guides, knowledge base articles, and trained support resources available for your users and for your support staff.

Support articles should include details on how to back-up personal data, how to enroll, and instructions on any new apps like Outlook or Teams, etc.
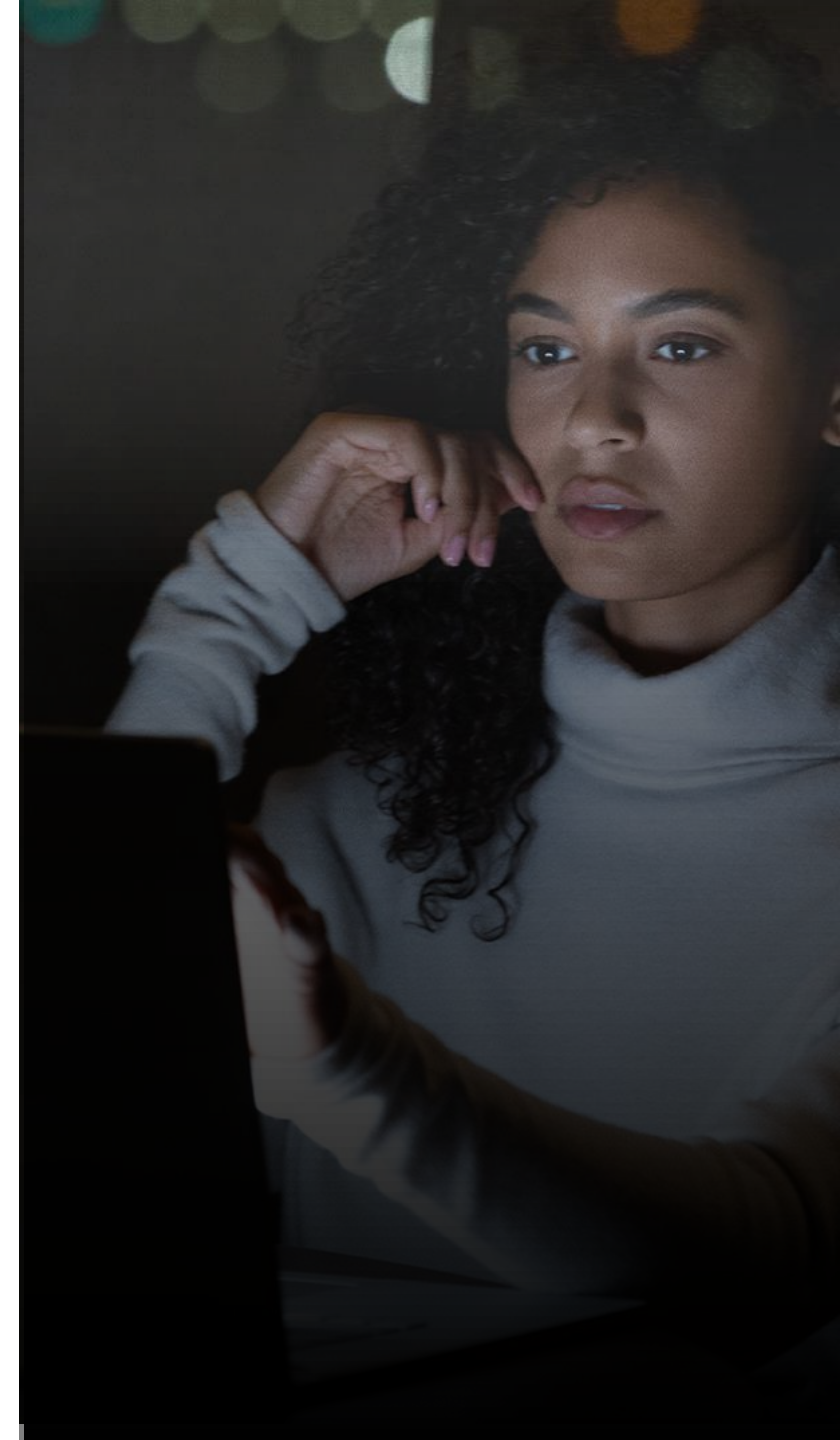
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We are here to help

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