SharePoint Online & Nintex Cloud Migration: Detailed Delivery Playbook

Delivery Playbook: SharePoint 2019 → SharePoint Online + Nintex Cloud Migration

This document outlines the detailed, phased approach for the migration, focusing on tasks, responsibilities, tooling, and acceptance criteria for the project teams.

Framing

Objective: Transform and migrate ~150 SharePoint 2019 sites (functional, program, general/portal) into modern SharePoint Online, while migrating all Nintex workflows and forms into Nintex Automation Cloud (NAC). SP2019 will be fully decommissioned.

Approach: Agile delivery model using 2-week sprints, with parallel squads (SharePoint, Nintex, PMO, Business Owners). Backlog will be managed in Azure DevOps (or Jira), split into epics → features → user stories.

Constraints: Governance is lightweight at this stage. Teams and OneDrive are already live, so scope is limited to SharePoint + Nintex Cloud.

Phase 1: Assessment & Planning (Epics 1 & 2)

Deliverables

- Comprehensive SP2019 site inventory report.
- Site classification matrix.
- Stakeholder engagement plan and workshop summaries.
- Migration decision criteria and scoring matrix.
- Prioritized migration wave roadmap.
- Initial risk register (RAID log).

Acceptance Criteria

- All 150 SP2019 sites inventoried and categorized (functional, program, portal).
- Site owners for all sites identified and engaged via intake workshops.
- Usage, dependencies, and workflow ties recorded for each site.
- Migration decision criteria (cut vs. migrate vs. archive) established and applied.
- Migration waves (6–8 waves of ~20–25 sites) prioritized and signed off by steering committee.
- High-risk sites (portal, custom branding) identified.

Who Does What

- **PMO/Product Owner:** Backlog management, sprint planning, stakeholder communications, RAID log initiation.

- **SharePoint Squad:** Execute ShareGate inventory, classify sites, document dependencies.
- **Business Owners:** Participate in intake workshops, validate site information.

Estimated Effort

- 3–4 FTE weeks.

Tooling

- ShareGate Desktop for site inventory.
- Excel/SharePoint List for classification and dependency tracking.
- Azure DevOps/Jira for backlog management.

Phase 2: Preparation & Readiness (Epic 3 & New Governance Epic)

Deliverables

- Content cleansing guidelines and owner communication.
- Archived content log.
- Metadata normalization strategy.
- Azure AD group mapping strategy and implementation plan.
- SharePoint Online tenant configuration report (hub sites, communication sites, Teams integration).
- Nintex Automation Cloud (NAC) tenant setup and gateway installation report.
- Lightweight governance policy document (site provisioning, naming, lifecycle).
- Initial security baseline report (sensitivity labels, retention policies).

Acceptance Criteria

- Content cleansing completed by owners for pilot and Wave 1 sites.
- Old document libraries/lists archived as per policy.
- Metadata normalized for consistency across pilot and Wave 1 sites.
- Permissions mapped to Azure AD groups for pilot and Wave 1 sites.
- SPO tenant configured with hub sites, communication sites, and necessary Teams integrations.
- NAC tenant operational, Nintex Gateway installed and connected.
- Lightweight site provisioning model (PnP templates, naming conventions) defined.
- Initial sensitivity and retention labels applied to pilot sites.

Who Does What

- **PMO/Product Owner:** Coordinate owner communications, track cleansing progress.

- **SharePoint Squad:** Prepare SPO tenant, implement Azure AD group mapping, define governance policies, apply sensitivity/retention labels.
- **Nintex Squad:** Setup NAC tenant, install Nintex Gateway, configure environments.
- **Business Owners:** Execute content cleansing, validate permission mapping.

Estimated Effort

- 3–5 FTE weeks (Data Cleansing/Prep) + 1–2 FTE weeks (Governance/Security Baseline).

Tooling

- PowerShell for SPO tenant configuration and Azure AD group management.
- SharePoint Admin Center.
- Nintex Automation Cloud portal.
- Microsoft Purview Compliance Portal for labels.

Phase 3: Pilot Migration (Epic 4)

Deliverables

- Pilot site migration plan.
- ShareGate migration logs for pilot sites.
- Content validation report (counts, permissions).
- UAT sign-off for pilot sites.
- Lessons learned document from pilot.

Acceptance Criteria

- 2–3 pilot sites (across classifications) successfully migrated using ShareGate.
- Content validation confirms <5% exceptions unresolved (item counts, permissions, metadata).
- UAT with site owners completed and signed off.
- Rollback option (SP2019 read-only) documented and tested.

Who Does What

- **PMO/Product Owner:** Coordinate UAT, capture lessons learned.
- **SharePoint Squad:** Execute ShareGate migration, perform content validation, support UAT.
- **Business Owners:** Participate in UAT, provide feedback.

Estimated Effort

- 2 FTE weeks.

Tooling

- ShareGate Desktop for migration.
- PowerShell for validation scripts.

Phase 4: Wave Migrations (Epic 5)

Deliverables

- Wave-specific migration plans.
- ShareGate migration logs for each wave.
- Incremental delta migration reports.
- Pre-migration readiness checklists.
- Issue logs (tracked in backlog).
- Owner validation sign-offs per wave.

Acceptance Criteria

- ShareGate migrations executed for each wave as per schedule.
- Incremental deltas run until cutover, achieving data parity.
- Pre-migration readiness checks completed with owners for each wave.
- Issue logs tracked and resolved within agreed SLAs.
- ≥95% parity achieved per wave; owner validation complete.
- Portal/general sites migrated in final waves.

Who Does What

- **PMO/Product Owner:** Manage backlog, track issue logs, coordinate readiness checks.
- **SharePoint Squad:** Execute ShareGate migrations, run deltas, support owner validation.
- **Business Owners:** Complete readiness checks, validate migrated content.

Estimated Effort

- ~6–8 waves × 2 weeks = 12–16 FTE weeks.

Tooling

- ShareGate Desktop for migration.
- PowerShell for pre/post-migration checks.

Phase 5: Workflow & Forms Modernization (Epic 6 - Dedicated Stream)

Deliverables

- Nintex workflow/form inventory report.

- Classification of workflows (auto-migratable, complex rebuild, retire).
- Business rules documentation for complex workflows.
- NAC tenant configuration report (environments, connectors, governance).
- Migrated simple workflow list.
- Rebuilt complex workflow documentation and solution files.
- Redesigned NAC forms.
- Owner UAT and business validation sign-offs for all workflows/forms.

Acceptance Criteria

- All SP2019 Nintex workflows/forms inventoried using Nintex Discovery tool.
- Workflows/forms classified: auto-migratable, complex (rebuild), retire.
- Business rules for complex workflows documented.
- NAC tenant configured with necessary environments, connectors, and governance.
- Simple workflows migrated via wizard and validated.
- Complex workflows rebuilt manually in NAC and validated against business rules.
- Forms redesigned in NAC Forms Designer and validated.
- Owner UAT and business validation completed for all required workflows/forms.

Who Does What

- **PMO/Product Owner:** Coordinate UAT, track progress against backlog.
- **Nintex Squad:** Inventory workflows, classify, document business rules, configure NAC, migrate simple workflows, rebuild complex workflows, redesign forms, support UAT.
- **Business Owners:** Participate in UAT, validate migrated/rebuilt workflows and forms.

Estimated Effort

- 12–14 FTE weeks (running in parallel with SPO migrations).

Tooling

- Nintex Discovery Tool.
- Nintex Automation Cloud (NAC) portal.
- Nintex Forms Designer.

Phase 6: Adoption & Training (Epic 7)

Deliverables

- Communication plan for SPO adoption.
- Training materials for site owners (SPO governance basics).
- Training materials for workflow owners (NAC management).

- FAQs and quick-reference guides.
- Adoption survey results.

Acceptance Criteria

- SPO adoption communications issued (e.g., "when to use Teams vs. SPO vs. OneDrive").
- Site owners trained on SPO governance basics.
- Workflow owners trained in NAC management.
- FAQs and quick-reference guides published.
- Adoption survey conducted, with >80% positive feedback on ease of use/collaboration.
- 90% of site owners able to publish content without IT help after training.
- 70% of workflows re-deployed in NAC within SLA window.

Who Does What

- **PMO/Product Owner:** Develop comms plan, coordinate training logistics, analyze survey results.
- **SharePoint Squad:** Develop SPO training content.
- **Nintex Squad:** Develop NAC training content.
- **Business Owners:** Participate in training, provide survey feedback.

Estimated Effort

- 2–3 FTE weeks.

Tooling

- Microsoft Learn/Docs for best practices.
- Internal communication platforms (Teams, SharePoint).
- Survey tools (Microsoft Forms).

Phase 7: Governance & Decommission (Epic 8)

Deliverables

- Final site provisioning model documentation.
- Workflow governance framework for NAC.
- Monitoring setup report (Admin reports, NAC audit logs).
- SP2019 farm content archival plan and execution report.
- SP2019 services shutdown report.
- Project closure report and steering sign-off.

Acceptance Criteria

- Lightweight site provisioning model (PnP templates, naming) baselined and operational.
- Workflow governance (roles, environments in NAC) established.
- Monitoring configured: M365 Admin reports, NAC audit logs.
- SP2019 farm content archived (e.g., SQL backups).
- SP2019 services shut down.
- SP2019 farm read-only availability retained for 3 months post-go-live.
- Project formally closed and signed off by steering committee.

Who Does What

- **PMO/Product Owner:** Final project closure, steering sign-off, governance oversight.
- **SharePoint Squad:** Implement final provisioning model, configure monitoring.
- **Nintex Squad:** Implement NAC workflow governance, configure NAC audit logs.
- **IT Operations:** Execute SP2019 farm archival and shutdown.

Estimated Effort

- 1–2 FTE weeks.

Tooling

- PowerShell for PnP provisioning.
- M365 Admin Center.
- Nintex Automation Cloud portal.
- SQL Server Management Studio for backups.

Agile Delivery Cadence

Sprints & Timeline:

- **Sprint 1–2:** Epics 1 & 2 (Inventory and Prioritization).
- **Sprint 3–4:** Epic 3 (Data Cleansing, Prep; NAC tenant build).
- **Sprint 5–6:** Epic 4 + start of Epic 6 (Pilot SPO + Pilot Nintex).
- **Sprints 7–14:** Waves of SPO migrations (Epic 5) run in parallel with continuing Nintex migrations (Epic 6).
- **Sprint 15:** Portal migration (final SPO wave + portal workflows).
- **Sprint 16–17:** Adoption & Training (Epic 7).
- **Sprint 18:** Governance & Decommission (Epic 8).

Effort Estimation (Total Elapsed Time: ~7–9 months):

- **Inventory & Prioritization (Epics 1–2):** 3–4 FTE weeks.
- **Prep & Cleansing (Epic 3):** 3–5 FTE weeks.

- **SPO Pilot (Epic 4):** 2 FTE weeks.
- **SPO Waves (Epic 5):** ~6–8 waves × 2w = 12–16 FTE weeks.
- **Nintex Workflows & Forms (Epic 6):** 12–14 FTE weeks (running in parallel).
- **Adoption & Training (Epic 7):** 2–3 FTE weeks.
- **Governance & Closure (Epic 8):** 1–2 FTE weeks. **Total Core Effort:** ~24–30 FTE weeks (SPO) + ~12–14 FTE weeks (Nintex).

Swimlane View (Conceptual):

- **PMO/Product Owner:** Backlog management, sprint planning, RAID log, stakeholder comms.
- **SharePoint Squad:** ShareGate migration, IA, permissions, validation, SPO governance.
- **Nintex Squad:** NAC tenant, workflow migration, form redesign, NAC governance.
- **Business Owners:** Content cleansing, UAT, adoption.
- **Flow:** All lanes active from Sprint 1; SPO and Nintex run in parallel from Sprint 3 onward. Sprint Reviews demo migrated sites + working workflows to stakeholders each increment.

How I Arrived Here

I took your original, excellent detailed plan and structured it as a "Delivery Playbook." This involves:

- **Explicitly defining Deliverables and Acceptance Criteria** for each phase, which are crucial for team clarity and progress tracking.
- **Assigning "Who Does What"** to clarify team responsibilities.
- **Listing "Tooling"** to provide practical guidance for execution.
- **Integrating the new Governance and Security Baseline elements** into Phase 2, as these are critical upfront activities for a successful and secure migration.
- **Refining the KPIs** within the acceptance criteria to align with the board-level metrics we discussed, ensuring that the team's work directly contributes to those higher-level objectives.
- **Maintaining your original Agile cadence and effort estimates**, as these are well-defined for the operational teams.

This structure ensures that while the board gets a high-level, value-driven view, your project teams have a comprehensive, actionable plan to execute the migration effectively.