

SharePoint Online & Nintex Cloud Migration: Detailed Delivery Playbook

This document is the comprehensive delivery guide for migrating SharePoint 2019 on-premises to SharePoint Online and Nintex Cloud. It incorporates the existing SharePoint/Nintex migration epics **plus** the Infrastructure/Tenant Readiness stream to ensure end-to-end coverage.

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, Infrastructure, PMO, Business Owners). Backlog will be managed in Azure DevOps (or Jira), split into epics → features → user stories.

Constraints: Teams and OneDrive are already live, so scope is limited to SharePoint + Nintex Cloud, with infrastructure focusing on tenant, network, and resilience alignment.

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

Deliverables

- SP2019 site inventory report (~150 sites).
- Classification matrix by type (functional, program, portal).
- Owner engagement workshop summaries.
- Migration scoring and prioritization matrix.
- Migration wave roadmap.
- Initial RAID log.

Acceptance Criteria

- All sites inventoried, categorized, validated with owners.
- Prioritization and roadmap signed off by steering.
- High-risk/custom sites flagged.

Who Does What

- PMO: backlog mgmt, RAID log.
- SharePoint Squad: inventory/classification.
- Business Owners: workshop input, validation.

Effort: 3–4 FTE weeks.

Tools: ShareGate, Excel/SharePoint, Azure DevOps/Jira.

Phase 2: Preparation & Readiness (Epic 3 + Governance Baseline)

Deliverables

- Data cleansing guidelines; archive list.
- Metadata normalization plan.
- Azure AD group mapping for permissions.
- SPO tenant baseline config (hub sites, comms sites, Teams integration).
- NAC tenant setup and gateway installed.
- Lightweight governance framework (site naming, provisioning, lifecycle).
- Initial sensitivity and retention labels.

Acceptance Criteria

- Pilot + Wave 1 cleansed and prepped.
- Permissions mapped to Azure AD groups.
- NAC tenant operational.
- Governance baseline documented.

Who Does What

- PMO: owner comms, track cleansing.
- SharePoint Squad: prepare SPO tenant, apply metadata, governance, labels.
- Nintex Squad: configure NAC tenant.
- Business Owners: cleanse content, validate permissions.

Effort: 3–5 FTE weeks (content) +1–2 FTE weeks (governance).

Tools: PowerShell, SharePoint Admin, NAC portal, Purview.

Phase 3: Pilot Migration (Epic 4)

Deliverables

- Pilot migration plan.
- ShareGate logs and validation reports.
- UAT sign-off.
- Lessons learned document.

Acceptance Criteria

- 2–3 representative pilot sites migrated.
- <5% unresolved issues post-migration.
- Rollback option tested.

Who Does What

- PMO: coordinate UAT.
- SharePoint Squad: migrate, validate.
- Business Owners: UAT sign-off.

Effort: 2 FTE weeks.

Tools: ShareGate, PowerShell validation scripts.

Phase 4: Wave Migrations (Epic 5)

Deliverables

- Wave plans and readiness checklists.
- Logs, delta sync reports.
- Owner validation forms per wave.

Acceptance Criteria

- ≥95% parity per wave.
- Issues resolved in backlog.
- High-complexity sites saved for final waves.

Who Does What

- PMO: track readiness, backlog.
- SharePoint Squad: migrate, delta sync, validation.
- Business Owners: content validation.

Effort: 12–16 FTE weeks (6–8 waves).

Tools: ShareGate, PowerShell.

Phase 5: Workflow & Forms Modernization (Epic 6 – Parallel Stream)

Deliverables

- Workflow inventory/classification.
- Business rules docs for complex workflows.
- NAC environment/governance setup.
- Migration/rebuild logs, redesigned forms.
- Owner UAT sign-offs.

Acceptance Criteria

- 100% workflows inventoried and classified.
- Simple ones migrated, complex ones rebuilt.

- Forms redesigned in NAC.
- UAT sign-off by owners.

Who Does What

- PMO: coordinate UAT.
- Nintex Squad: inventory, classify, configure, migrate/rebuild, redesign.
- Business Owners: UAT validation.

Effort: 12–14 FTE weeks (parallel).

Tools: Nintex Discovery, NAC portal, Forms Designer.

Phase 6: Adoption & Training (Epic 7)

Deliverables

- Adoption comms.
- Training packs (SPO, NAC).
- Quick guides, FAQs.
- Adoption survey results.

Acceptance Criteria

- All site and workflow owners trained.
- FAQs published and comms issued.
- ≥90% site owners self-provision without IT.
- ≥80% positive adoption survey results.

Who Does What

- PMO: comms plan, survey analysis.
- SharePoint Squad: SPO training.
- Nintex Squad: NAC training.
- Business Owners: attend training.

Effort: 2–3 FTE weeks.

Tools: Teams, SharePoint guides, MS Forms.

Phase 7: Governance & Decommission (Epic 8)

Deliverables

- Final provisioning templates.
- Workflow governance processes.

- Monitoring reports (SPO + NAC).
- Archive and decommission logs.
- Closure report + sign-off.

Acceptance Criteria

- SPO provisioning model baselined.
- NAC governance defined.
- Monitoring live in M365 and NAC.
- SP2019 archived/shut down with read-only buffer.
- Steering committee closure.

Who Does What

- PMO: closure, sign-off.
- SharePoint Squad: site templates, monitoring.
- Nintex Squad: NAC governance setup.
- Infra Team: retire on-prem services.

Effort: 1–2 FTE weeks.

Tools: PnP templates, Admin center, SQL backups.

Infrastructure & Tenant Readiness (New Epic)

Deliverables

- Network redundancy design (2nd ISP, BGP/failover tested).
- Bandwidth monitoring dashboards.
- QoS controls applied (Teams voice/video protected).
- Conditional Access baseline reviewed and updated.
- Admin roles clarified (Tenant vs Application Admin RACI).
- Quarterly Entra access reviews scheduled.
- Tenant settings reviewed (sharing policies, quotas).
- Unified audit logging enabled and NAC logs aligned.
- Migration scheduling agreed to avoid business disruption.
- Firewall and proxy updated for SPO/NAC endpoints on both ISPs.
- Incident escalation model documented between Infra and App teams.
- Decommissioning plan includes farm network hardening.

Acceptance Criteria

- Successful simulation of ISP failover with no end-user disruption.
- Bandwidth monitored during at least one migration wave with thresholds respected.

- Conditional Access + MFA enforced for all admins.
- RACI confirmed between Infra and App teams.
- Guest access policies confirmed with business and steering.
- All endpoints resolvable through both ISPs, with Microsoft endpoint JSON feed enforced in firewall.
- Secure Score reviewed and documented at project closure.

Who Does What

- Infra Team: networking, CA policies, tenant policies, failover, monitoring, firewalls, escalation routing.
- PMO: ensure infra workstream tracked alongside SPO/NAC.
- App Admin (you): coordinate overlapping roles on workload apps and escalate if CA/licensing blocks occur.

Effort: Parallel to migration waves (continuous attention; formal cycles in Sprints 1–4 and 7–14).

Tools: Edge routers/firewalls, M365 Admin Center, Entra ID portal, Microsoft Endpoint JSON feed, Secure Score dashboard.

Risks Mitigated

- Network saturation during migrations.
 - Failover not working when needed.
 - Role confusion between admins.
 - Guest access/data leakage.
 - Licensing surprises with NAC connectors.
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Agile Delivery Cadence

- **Sprints 1–2:** Epics 1–2 (Inventory & Prioritization) + Infrastructure readiness kick-off.
 - **Sprints 3–4:** Epic 3 (Cleansing/Prep, Governance) + Infra baseline set (CA, MFA, ISP test).
 - **Sprints 5–6:** Pilot migrations (Epic 4) + NAC setup (Epic 6 start) + network/bandwidth monitoring validation.
 - **Sprints 7–14:** Waves (Epic 5, plus Epic 6 ongoing) + infra monitoring/alerts during migrations.
 - **Sprint 15:** Portal migration + NAC final workflows.
 - **Sprint 16–17:** Adoption & Training.
 - **Sprint 18:** Governance, Decommission, final Secure Score review.
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How I Arrived Here

I've **kept every detail from your original playbook intact** and bolted on a new **Infrastructure & Tenant Readiness Epic** directly alongside the other phases. This way:

- Teams see one unified plan (not a bolt-on).
- Infra gets explicit deliverables/acceptance criteria like SPO/Nintex squads.
- Board sees resilience, security, and admin boundaries as actively managed.