

Pre-Engagement Questionnaire Transition to Cloud Assessment

[Company name]

7/13/2021

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Company Overview

Company Name:		Industry:	
	Number of employees:		
% of Firstline employees (if any):			
Geography:	UK, North America, EMEA, APAC, WW		
Point of Contact			
Name:			
Email:			
Telephone:			

Project Team

Capture detailed information about the key stakeholders of your Transition to Cloud rollout project. Note that one person can play several roles throughout the project.

Role	Name, email address, phone number	Location, time zone	Comments
Executive Sponsor			
Project Lead			
Collaboration Lead/Architect			
Consultant			
Project Manager			
Change Management/ Adoption Specialist			
Network Lead			
Identity/Security Lead			
Telephony Lead			
Desktop Lead			
Support/Help Desk Lead			
Deployment Lead			
Service Owner			
Facilities Lead			
Video Team Lead			
In Scope Business Unit Leads			

Introduction

This document provides questions to help understand a your company's current Modern Workplace environment in order to help support a quick onramp to Microsoft 365.

The questionnaire is divided into multiple sections to confirm your organization's readiness for your Teams deployment in several major areas. Work with your project team to provide the requested information with as much detail as possible to facilitate your planning activities.

Please complete and return the following survey within two weeks.

Office 365 tenant details

Use the following table to capture information about the Office 365 tenant.

Question	Answer	Comments
<p>Does your organization already have a production Office 365 tenant?</p> <p>If you have more than one tenant associated with your organization, note all the IDs.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<p>Tenant Name:</p> <p>Tenant ID:</p>
In what regions are the tenants deployed?		
Does your tenant have an industry name?		
Are these tenants Office 365 Multi-tenant or Dedicated?	<input type="checkbox"/> Multitenant <input type="checkbox"/> Dedicated	
<p>Which Microsoft Online products are in use today?</p> <p>Note the number of users enabled for each service in the Comments column.</p>	<input type="checkbox"/> Microsoft Teams <input type="checkbox"/> Skype for Business Online <input type="checkbox"/> Exchange Online <input type="checkbox"/> SharePoint Online <input type="checkbox"/> OneDrive for Business <input type="checkbox"/> Yammer <input type="checkbox"/> Flow <input type="checkbox"/> PowerApps <input type="checkbox"/> Yammer <input type="checkbox"/> PowerBI <input type="checkbox"/> Other	
<p>What license level is enabled for users?</p> <p>If you have specific licensing levels with add-ons (such as Teams Phone, Calling Plans, etc.) please list in the comments section</p>	<input type="checkbox"/> E1/G1/A1 <input type="checkbox"/> E3/G3/A3 <input type="checkbox"/> E5/G5/A5 <input type="checkbox"/> Azure AD Premium P1 <input type="checkbox"/> Azure AD Premium P2 <input type="checkbox"/> Other (specify)	<p>The number of users for each SKU:</p> <p>Add-ons (if applicable)</p>
What is the current Active Directory forest functional level in the environment?	<input type="checkbox"/> Older Version <input type="checkbox"/> Windows Server 2012	

If there's more than one forest, note the details in the Comments column.	<input type="checkbox"/> Windows Server 2012 R2 <input type="checkbox"/> Windows Server 2016	
What are you using for directory synchronization today?	<input type="checkbox"/> No sync (cloud only) <input type="checkbox"/> Azure Active Directory Connect (Specify version in the Comments column.) <input type="checkbox"/> Other (Specify in the Comments column.)	
If you are using Azure Active Directory Connect, have you enabled Pass-through Authentication?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If you are using Azure Active Directory Connect, have you enabled Password Hash Synchronization?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> No, but we are open to do so	
What are you using for user provisioning?		
Is federated identity currently deployed? (Active Directory Federation Service or third-party)	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If you're using federated identity, what is the federation infrastructure?	<input type="checkbox"/> Older Version <input type="checkbox"/> Windows 2012 AD FS <input type="checkbox"/> Windows 2012 R2 AD FS <input type="checkbox"/> Windows 2016 AD FS <input type="checkbox"/> Third-party federation gateway (Note the details in the Comments column.)	

Are you using MFA today	<input type="checkbox"/> Yes (Note the details in the Comments column.) <input type="checkbox"/> No	
If you currently maintain an active Office 365 tenant, is the SMTP/SIP domain of your targeted users associated with the tenant?	<input type="checkbox"/> N/A – No Office 365 tenant in place <input type="checkbox"/> No, users' SMTP/SIP domain isn't associated with any tenants in Office 365 <input type="checkbox"/> Yes, users' SMTP/SIP domain is associated with an existing tenant in Office 365	
Do user UPNs match their primary SMTP address?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Inconsistently	

Existing collaboration platform summary

Use the following table to capture information about your existing collaboration platform deployment.

Question	Answer	Comments
Is Microsoft Teams deployed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

<p>Is Skype for Business deployed?</p> <p>For on-premises and hybrid deployments, make sure you note the version and cumulative update (CU) details in the Comments column.</p>	<input type="checkbox"/> Yes, Office 365 <input type="checkbox"/> Yes, hybrid (with Office 365) <input type="checkbox"/> Yes, on-premises <input type="checkbox"/> Yes, online, dedicated (Microsoft) <input type="checkbox"/> Yes, hosted, dedicated (third party) <input type="checkbox"/> Yes, hosted, shared (third party) <input type="checkbox"/> No, other	
<p>Is Exchange deployed?</p> <p>For on-premises and hybrid deployments, make sure you note the version and CU details in the Comments column.</p>	<input type="checkbox"/> Yes, Office 365 <input type="checkbox"/> Yes, hybrid (with Office 365) <input type="checkbox"/> Yes, on-premises <input type="checkbox"/> Yes, online, dedicated (Microsoft) <input type="checkbox"/> Yes, hosted, dedicated (third party) <input type="checkbox"/> Yes, hosted, shared (third party) <input type="checkbox"/> No, other	<p>If hybrid, please specify the number of users that are on-premises vs Online</p>

<p>Is SharePoint deployed?</p> <p>For on-premises and hybrid deployments, make sure you note the version and CU details in the Comments column.</p>	<input type="checkbox"/> Yes, Office 365 <input type="checkbox"/> Yes, hybrid (with Office 365) <input type="checkbox"/> Yes, on-premises <input type="checkbox"/> Yes, online, dedicated (Microsoft) <input type="checkbox"/> Yes, hosted, dedicated (third party) <input type="checkbox"/> Yes, hosted, shared (third party) <input type="checkbox"/> No, other	
<p>Is Office 365 OneDrive for Business deployed?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<p>Do you have any other third-party collaboration / conferencing platforms deployed and in use today?</p> <p>If so, note the number of users of these platforms and the usage details in the Comments column.</p>	<input type="checkbox"/> Cisco WebEx <input type="checkbox"/> Slack <input type="checkbox"/> Zoom <input type="checkbox"/> Salesforce Chatter <input type="checkbox"/> Other (Specify in the Comments column.)	<p>Number of users:</p> <p>Details:</p>
<p>Are you planning to move users from these third-party platforms to Teams?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<p>What is the current telephony and conferencing solution of the users who are in scope for this initiative?</p>		

Microsoft Teams (if applicable)

If applicable, capture the details of your Teams deployment by using the sample table below. If you haven't deployed Teams, skip this section.

Question	Answer	Comments
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<p>What types of users are enabled for Teams?</p>	<input type="checkbox"/> All users in the organization <input type="checkbox"/> Specific users/user groups (Specify in the Comments column)	
<p>Which Teams features and modalities are in use?</p>	<input type="checkbox"/> Channel-based conversations <input type="checkbox"/> Private chat <input type="checkbox"/> Guest access <input type="checkbox"/> Channel meetings <input type="checkbox"/> Private meetings <input type="checkbox"/> Private calling <input type="checkbox"/> Ad-hoc channel meetup <input type="checkbox"/> Videos in meetings <input type="checkbox"/> Screen sharing in meetings <input type="checkbox"/> Audio conferencing <input type="checkbox"/> Applications (apps) <input type="checkbox"/> Tabs <input type="checkbox"/> Bots <input type="checkbox"/> Flow <input type="checkbox"/> Teams Phone/Telephony <input type="checkbox"/> Connectors <input type="checkbox"/> Custom cloud storage integration (Box, Dropbox, ShareFile, Google Drive) <input type="checkbox"/> Channel email integration <input type="checkbox"/> Other (Specify in the Comments column.)	
<p>What Teams upgrade modes are in use across your users? For each modality please indicate a percentage or number</p>	<input type="checkbox"/> Islands _____ (no. or %) <input type="checkbox"/> Skype for Business with Teams collaboration _____ (no. or %) <input type="checkbox"/> Skype for Business with Teams collaboration and meetings _____ (no. or %) <input type="checkbox"/> Teams Only _____ (no. or %) <input type="checkbox"/> Skype for Business only _____ (no. or %)	
<p>What applications and/or Bots have you deployed to Teams?</p>		

Have you specifically blocked any Teams capabilities? If Yes, note the details in the Comments column.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Which Teams clients are in use?	<input type="checkbox"/> Web <input type="checkbox"/> Windows <input type="checkbox"/> Mac <input type="checkbox"/> Linux (Preview) <input type="checkbox"/> iOS <input type="checkbox"/> Android <input type="checkbox"/> Certified phones	
Who has permissions to create teams?	<input type="checkbox"/> Everyone in the organization (This is the default setting) <input type="checkbox"/> Specific people (Specify in the Comments column.)	
Who has permissions to invite Guest users into teams?	<input type="checkbox"/> Everyone in the organization <input type="checkbox"/> Specific people in the inviter role group <input type="checkbox"/> No one	
Are you using security and compliance features in Teams?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Skype for Business Online (if applicable)

If applicable, capture the details of your Skype for Business Online deployment by using the sample table below. If you haven't deployed Skype for Business Online deployment, skip this section.

Question	Answer	Comments
What types of users are enabled for Skype for Business Online?	<input type="checkbox"/> All users in the organization <input type="checkbox"/> Specific users/user groups (Specify in the Comments column)	

What modalities and features are currently in use today?	<input type="checkbox"/> Instant Messaging and Presence (IM/P) <input type="checkbox"/> Conferencing <input type="checkbox"/> Federation <input type="checkbox"/> Meeting Recording <input type="checkbox"/> Microsoft Audio Conferencing <input type="checkbox"/> Third-party audio conferencing (Note the details in the Comments column.) <input type="checkbox"/> Calling Plans (formerly PSTN calling) <input type="checkbox"/> Organizational Auto Attendants <input type="checkbox"/> Call Queues	
Have you specifically blocked any Skype for Business Online capabilities? If Yes, note the details in the Comments column.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
What method are you using or plan to use to connect Teams Phone (formerly Phone System / Cloud PBX) to the PSTN? Select all that apply.	<input type="checkbox"/> Calling Plans (formerly PSTN calling) <input type="checkbox"/> On-premises PSTN connectivity (leveraging existing Skype for Business 2015 or Lync Server 2013 deployment) <input type="checkbox"/> On-premises PSTN connectivity (using Cloud Connector)	
Have you ported any phone numbers to Microsoft? This is applicable to Calling Plans and Audio Conferencing features.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Skype for Business on-premises (if applicable)

If applicable, capture the details of your Skype for Business deployment by using the sample table below. If you haven't deployed Skype for Business on-premises, skip this section.

Question	Answer	Comments
What versions of Lync or Skype for Business currently are deployed on-premises?	<input type="checkbox"/> Older Version <input type="checkbox"/> Lync Server 2013 <input type="checkbox"/> Skype for Business Server 2015	

	<input type="checkbox"/> Skype for Business Server 2019	
Is hybrid with Skype for Business Online configured?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Is this environment hosted and managed by a third party? If Yes, note the details in the Comments column.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
What modalities and features are currently in use today?	<input type="checkbox"/> Instant Messaging and Presence (IM/P) <input type="checkbox"/> Conferencing <input type="checkbox"/> Federation <input type="checkbox"/> Meeting Recording <input type="checkbox"/> Persistent Chat / Group Chat <input type="checkbox"/> Response Groups <input type="checkbox"/> Microsoft Audio Conferencing (formerly Dial in Conferencing) on your on-premises Lync Server or Skype for Business deployment <input type="checkbox"/> Third-party audio conferencing (Note the details in the Comments column) <input type="checkbox"/> Enterprise Voice using on-premises PSTN connectivity <input type="checkbox"/> Calling Plans (formerly PSTN calling) via Hybrid with Skype for Business Online	
Which version(s) of Edge Server do you have deployed?	<input type="checkbox"/> Older Version <input type="checkbox"/> Lync Server 2013 <input type="checkbox"/> Skype for Business Server 2015 <input type="checkbox"/> Skype for Business Server 2019	
Do you have Lync or Skype for Business Edge deployed into more than one datacenter? If Yes, note the details in the Comments column.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Select services that your Edge role provides today	<input type="checkbox"/> External user access (corporate users) <input type="checkbox"/> Remote user access (anonymous external meeting participants)	

	<input type="checkbox"/> Federation <input type="checkbox"/> Media relay	
<p>Which of the following voice calling features do you currently have dependencies on?</p> <p>Note any additional dependencies in the Comments column.</p>	<input type="checkbox"/> Busy options <input type="checkbox"/> Call park <input type="checkbox"/> Call pickup or group call pickup <input type="checkbox"/> Common area phones, or "hot desking" <input type="checkbox"/> Response groups or hunt groups <input type="checkbox"/> Shared line appearance <input type="checkbox"/> Private line <input type="checkbox"/> Voicemail <input type="checkbox"/> Call via work <input type="checkbox"/> Emergency or information numbers (911, 811, 411) <input type="checkbox"/> Extension dialling <input type="checkbox"/> Auto Attendant <input type="checkbox"/> Subscriber access <input type="checkbox"/> Analog devices <input type="checkbox"/> Fax <input type="checkbox"/> Caller ID masking or altering <input type="checkbox"/> Location-based routing <input type="checkbox"/> Least-cost routing <input type="checkbox"/> Elevator phone	

Networking and Connectivity to Office 365 services

Use the following table to capture your organization's networking details and how your users are (or will be) connected to Office 365 services.

Question	Answer	Comments
How many remote users do you have?		
Who is your main contact?		Provide name, email address and location of person who is responsible for maintaining this site and making changes

What is your WAN connection speed?		In Mbps (if applicable)
What is your internet connection speed?		In Mbps (if applicable)
How much bandwidth is reserved for real time traffic?		In Mbps
What kind of internet break-out does the site use?		Direct, via MPLS in other location, other (please describe)
What is your corporate connection type?		MPLS, other (please describe)
Are there traffic shapers/WAN optimizers/firewalls in place? If so, please list them.		Skype for Business requires a set of ports to be opened and should be excluded from any traffic shapers. It is therefore important to list these in advance.
If the answer is yes to the previous question, can you create exceptions and open ports for Skype for Business and/or Microsoft Teams Traffic? If not, please highlight this.		
Is Skype for Business and/or Microsoft Teams traffic allowed to/from this site? If so, has this been tested?		
Are users required to use a VPN when connecting to corporate resources remotely?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If a VPN is used, can Teams traffic be excluded from the VPN to access Office 365 Services directly?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Does your network support QoS?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Can you prioritize Teams audio and video traffic to drive a high-quality experience?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Do all locations within a region have internet egress, or is internet egress centralized for the entire region?	<input type="checkbox"/> Regional access to the internet	

	<input type="checkbox"/> Centralized access to the internet	
What PBXs are deployed in the site?		Please list the type and version
What kind of PSTN connectivity is available?		PRI, E1/T1, Sip Trunk etc.
Please supply the types of networking equipment used at this location		For instance, Aruba AP-100s and Extreme Network 7000 series
What is the number of concurrent PSTN calls?		Please collect statistics from your existing PBX
Please share your current conferencing statistics.		For example, 45 conferences per month, each containing 20 people on average.
What conferencing solution are you currently using?		
Do you have requirement to implement 911 services or similar functionality if outside the US?		
What kind of wireless infrastructure do you use in this site?		
How do (or how will) the users in scope for migration access Teams when they're in the office? Select all that apply.	<input type="checkbox"/> Routed NAT connection <input type="checkbox"/> Proxy server <input type="checkbox"/> Public Wi-Fi <input type="checkbox"/> Managed (not public) Wi-Fi <input type="checkbox"/> ExpressRoute (Microsoft peering)	
If access to Office 365 is through a proxy server, is there any way to bypass the proxy?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Is ExpressRoute being used today?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

	<input type="checkbox"/> No, but it's being planned	
Have you performed a Network Readiness Assessment?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Note: Please attach maps/diagrams or provide separately if available.

Endpoints

Use the following table to capture the details of the clients and endpoints in use.

Question	Answer	Comments
What desktop OS are the users using?	<input type="checkbox"/> Older Version <input type="checkbox"/> Windows 7 <input type="checkbox"/> Windows 8 <input type="checkbox"/> Windows 10 <input type="checkbox"/> Mac (Specify the version in the Comments column.) <input type="checkbox"/> Other (Note the details in the Comments column.)	
Do you use VDI in the organization? If yes please provide details such as vendor, version, percentage of VDI endpoints	<input type="checkbox"/> Yes <input type="checkbox"/> No	
What version of Microsoft Office is deployed to these devices?	<input type="checkbox"/> Older Version <input type="checkbox"/> Office 2013 <input type="checkbox"/> Office 2016 <input type="checkbox"/> Office 2019 <input type="checkbox"/> Office ProPlus <input type="checkbox"/> Mac Office 2011 <input type="checkbox"/> Mac Office 2016 <input type="checkbox"/> Mac Office 2019 <input type="checkbox"/> Other (Note the details in the Comments column.)	
Which Office deployment technology is in use in your organization?	<input type="checkbox"/> MSI <input type="checkbox"/> Click-to-Run	

<p>What are the allowed and supported mobile platforms in use?</p> <p>Select all that apply.</p>	<input type="checkbox"/> iOS <input type="checkbox"/> Android <input type="checkbox"/> Other (Note the details in the Comments column.)	
<p>How are mobile devices provided?</p> <p>Select all that apply.</p>	<input type="checkbox"/> Corporate devices <input type="checkbox"/> Bring your own device	
<p>What devices do users currently use to access voice and conferencing services (handsets, headsets, phones, video)?</p>		

Operations

Use the following table to capture the details of the operational aspects of your environment.

Question	Answer	Comments
What is your operations model for your Lync Server, Skype for Business Server, or Office 365 deployment today?		
Can you outline the current support arrangement for Lync Server, Skype for Business Server, or Office 365?		
If you're deploying to multiple countries or regions, does each country/region have its own IT/telephony staff to work with, or will this be managed centrally?	<input type="checkbox"/> Regional operations and support <input type="checkbox"/> Centralized operations and support	
Are you following the Call Quality Methodology?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Have you assigned an individual or team to the Quality Champion role for the collaboration platform in use?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
How do you monitor your Lync Server, Skype for Business Server, or Office 365 deployment?		
Do you experience call quality issues?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

How and when do you provide training to your helpdesk on new services and capabilities?		
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Adoption and Readiness

Use the following table and capture the current adoption and readiness state of your organization.

Question	Answer	Comments
What is your current active usage of Skype for Business/Teams?	____ % total active users versus enabled users in Skype for Business ____ % total active users versus enabled users in Teams	
How is your organization using Skype for Business/Teams?	Chats <ul style="list-style-type: none"> - IM - Calling - Sharing Meetings <ul style="list-style-type: none"> - Conferencing - Sharing All Hands (Broadcasts or Live events) Calling Collaboration	
Does your organization have a User Adoption and Change Management team?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
How do you currently measure success for technology rollouts like Skype for Business/Teams?		
What percentage of your user base would you say has adopted Skype for Business/Teams?		
What is user sentiment around Skype for Business/Teams?	<input type="checkbox"/> Good <input type="checkbox"/> Neutral <input type="checkbox"/> Bad	

Which of the following best describes the rollout strategy used for your Skype for Business/Teams deployment?	<input type="checkbox"/> Broad reach: Email campaign with links to training <input type="checkbox"/> Expanded: Broad reach plus a variety of awareness campaigns (posters, events, champions) and training (videos, user guides, in-person) <input type="checkbox"/> Tailored: Expanded, plus targeted messaging and training by persona <input type="checkbox"/> Other (Note the details in the Comments column.)	
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Cost Savings & Business Value Estimations (Optional)

Please provide information on cost dependencies. This section is optional and only necessary if you are wanting a deeper cost savings conversation.

Question	Answer	Comment
Collaboration and Communication current license costs	\$ per license	
Security current license costs	\$ per license	
Windows Virtual Desktop current license costs	\$ per license	
Power Apps current license costs	\$ per license	
Current E3 license cost	\$ per license	
Mobile Device Management and Mobile Application Management current license costs	\$ per license	
Multi-factor Authentication current license costs	\$ per license	
Identity and Access Management current license costs	\$ per license	
Classifications, Labels and Permissions current license costs	\$ per license	

MDOP current license costs	\$ per license	
Windows Defender AV current license costs	\$ per license	
Direct Access and Device Level VPN current license costs	\$ per license	
BitLocker current license costs	\$ per license	
Desktop Analytics current license costs	\$ per license	
Collaboration and Communication current license costs	\$ per license	
Admins that can be moved to other activities/not needed	# head count	
Annual cost per administrator	\$	
Reduced remediation cost*	\$	
Average number of yearly avoided trips*	# across the company	
Average cost per trip	\$	
Hours saved per year from improved business processes per person	#	
Average annual salary	\$	
Annual cost Windows, Office, CAL licenses	\$ per license	