

SMALL BUSINESS

GUIDE FOR MOVING TO THE CLOUD

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Small Business Guide for Moving to the Cloud

You may know that some cloud offerings integrate multiple applications in one and simultaneously provide updated information across numerous desktop and mobile devices. However, a really important advantage with cloud applications is the opportunity you have to expand the organization's transparency and amount of information sharing which can increase productivity.

Consider the Benefits: Just some of the benefits of cloud applications include easy collaboration, scalability, opportunity to reduce IT cost, automatic backups and free application updates.

Don't overlook the concerns: Recent surveys reveal the desire to maintain ownership of data, level of security, performance and uptime are some of the concerns.

What can cloud services do for you? After a thorough review of the business process, if approached properly, most businesses find the advantages of moving applications to the cloud far outweigh the concerns. However, each business has different needs and just moving some applications to the cloud may bring plenty of benefits.

What's important for your business? Many different cloud services are available for the small business owner today. Determine what's important for your business. Just note that moving to the cloud needs to be well planned. A good way to get started is to do a little homework.

Note: This guide is not intended to answer all your questions about moving to the cloud. Our goal is to establish a framework for the decision making process that the business owner who is thinking about moving to the cloud can use.

Step 1

Homework

Why move to the cloud? The correct answer is to solve a business problem. For example, you may wish to increase employee mobile outreach and improve customer relations. Next, develop a business case for the cloud. Consider cost effectiveness, scalability, improved security, mobility and application(s) cost.

Start by setting a goal. To start, perform an assessment of your current installed application base. Identify what cloud service(s) you could implement that would offer the most benefit and have the least disruptive impact to your business. You may want to add a new application that would reduce costs and build profits or one that would add mobility, improve customer satisfaction and grow sales.

Draw a diagram of your current workflow processes. Examine what's working and where improvements are needed. Invite your employees to offer suggestions about what processes could help them be more efficient in their jobs.

Identify applications which can move to the cloud. Make a list of the different types of software applications your business currently uses. Not all applications are candidates for moving to the cloud. In fact, many businesses employ a hybrid model keeping applications like financials and HR on-premise. Sort out those that have lower security and compliance requirements as a start. Examples are storage, CRM, employee email, project management, etc.

Research potential cloud vendor applications. Narrow the list of cloud applications to a few and determine a best fit for your business. Consider migration process, ease of integrating with other applications, flexible solutions, type of support offered, etc.

Review costs and resource impact. While many cloud service providers offer reduced content free versions, at some point you'll most likely buy a subscription plan. Take some applications you are interested in and do a thorough analysis of benefits, service level agreements, costs and risks. This step will help you choose a strategy consistent with business objectives.

Step 2

Decisions

Plan for growth. While there are plenty of benefits provided by moving to the cloud, the most important is, your business can grow from this decision. Of course you need to think it out carefully, do some planning, then review and plan again.

Avoid organizational risks. You no doubt have some services in mind that would be nice to have, but wait. Start with small steps and select an application that won't pose unacceptable risks to existing operations and that doesn't involve complex implementation.

Select an application to start the move. Most established businesses that have decided on migrating to the cloud have selected email or storage as a starting point. We recommend starting with storage since many businesses are familiar with this service. You need to consider some important features of your potential application. Ask the right questions. What about data integrity? Is the data encrypted in transit and while stored? Understand continuity of operations during periods of data interruption. Review access management. What about compliance requirements for sensitive information.

Try that cloud application. Start with a free trial from your selected provider and take the opportunity to find out about training, tutorials and support when you have a problem. Build a special team with a couple of employees who have a good understanding of your current process, understand the cloud and work well together. Run this special project separate from your current process. Explore advantages like collaboration and availability of information from mobile devices. Examine how your existing workflow processes, detailed in step 1, map to the new cloud application. Share the results with management, then plan on adjustments and staff training as necessary.

If you want to migrate services like email and don't have experience migrating data to the cloud, it's best to consult a pro. Just contact us for assistance in this area.

Communicate the plan. Let your employees know what to expect. Communicate what is changing, when and how. Point out the advantages of working with cloud applications like better collaboration and easier access to current data. To ease the transition, select employees who are good teachers, understand the cloud and can act as mentors to help other employees when needed.

Step 3

Implementation

Create an implementation plan.

Review your business requirements again. Taking into consideration your experience with that free trial, make sure the cloud service(s) you plan on using can meet those needs.

Develop a structured implementation approach and identify key objectives.

Create a business continuity plan during periods of data interruption.

Create a plan to monitor results against expectations.

Generate a backup and disaster recovery plan.

Understand and plan for any integration with other applications.

Establish roles. Allow your team leaders who are good mentors and understand the cloud to lead the implementation. Keep an open line of communication so management can understand the changes that are coming.

Establish expectations and priorities. Create an outline for your team to work with.

Highlight changes in work processes. Clearly identify processes that need to be changed. Document what's changing and how the new process works.

Communicate what's changing. While most people fear change, let your employees know about the many benefits of the new cloud service. Once they see the benefits of collaboration and mobile accessibility, you'll be hunting for the next application.

Train before implementing. Use the go slow approach. Have your team leaders and mentors work with small groups helping make the transition on a selected project. Identify one of the team members as a subject matter expert to answer any ongoing questions.

Solicit feedback and update plans. After every project it's always a good idea to hold a lessons learned session. Identify what went right and where improvements can be made in the process. Update the plan as needed.

Step 4

Support

Build a support team. Cloud applications are dynamic with automatic updates and feature improvements. Your support team should be capable early adopters ready to assist in problem resolution. Appoint a team member to manage provisioning, monitor changes, assess impact, then communicate with employees and management.

Monitor application performance and uptime. Now that you're up and running with your new cloud application, don't stop there. You shouldn't rely on your employees to determine if there are system performance issues. Utilize your monitoring system to compare with your initial assessment, validate that the new application is meeting your goals and isn't causing problems.

Document the new process. Document and publish changes that define the new process. Document provisioning guidelines, monitoring and reporting process. Reference the service providers documentation.