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# Preparing for Copilot: Tenant Consolidation with MigrationWiz<sup>®</sup>



## Document Overview

Tenant consolidations are driving a new wave of migrations. There are multiple reasons why organizations are jettisoning their multi-tenant structures in favor of a flatter single-tenant structure, but one of the predominant ones is adoption of Microsoft Copilot. Copilot is the generative AI assistant that is part of Microsoft 365 and for an MSP who wants to act on Copilot-driven consolidation opportunities, there are several very important things to know about Copilot. They have data leakage implications and also impact the relevance of the results that Copilot returns. This paper provides guidance on planning and executing tenant consolidation projects that preserve business continuity and achieve the client's business objectives, with special emphasis when one of those objectives is realizing the productivity gains enabled by Copilot.



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## Introduction to tenant consolidation

Tenant consolidation moves all of the users under an organization's umbrella, working in one or more tenants, into a single tenant. To put it another way, tenant consolidation is the execution of one or more tenant-to-tenant migrations to a single Destination tenant. In recent years, mergers and acquisitions [M+A] and their close cousins, divestitures, have been the primary drivers of tenant-to-tenant migrations as businesses needed to move users from one organization to another. Tenant consolidation, by contrast, is an intra-organizational effort.

Here are some of the scenarios that have led to the creation of multiple tenants and now, a desire to consolidate them:

- Larger companies that employ different domains or sub-brands, and have assigned separate tenants to smaller companies or branches under their umbrella
- Educational institutions that assigned different tenants to faculty and students, or to individual schools or departments
- Companies that needed to quickly support remote working during the COVID pandemic and established separate tenants for the sake of expediency

By consolidating, organizations avoid the challenges, headaches, and costs of maintaining multiple tenants, including:

- Overconsumption of cloud resources
- Lost productivity due to repeat logins and logouts for users in roles that require access to multiple tenants
- More variables and endpoints for IT to manage, leading to unnecessary complexity and costs
- Time and resources required to monitor security across multiple tenants

Consolidating multi-tenant environments enables organizations to leverage cloud solutions more effectively, better manage costs, and enable more seamless engagement among users. It leads to greater employee productivity, overall business efficiency and data security, all while lowering recurring costs.



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## Microsoft Copilot – a new, major driver of tenant consolidations

In addition to the above, there is one other key driver of tenant consolidation that is spurring an uptick in migrations: Microsoft Copilot. The integration of Microsoft's generative AI capability into Microsoft 365 creates a huge impetus for organizations that might have been taking a go-slow approach to their consolidation plans. Here's why: by design, Copilot searches and harvests data within a single tenant. When an organization has siloed itself into individual tenants, it greatly limits the scope and reach of what can be accomplished using Copilot.

Copilot is an AI-driven assistant accessible from Microsoft Office applications and Microsoft Teams. Copilot can interact with and generate content within applications such as Word, PowerPoint, Excel, and Outlook in response to specific prompts which can be as simple as a question or as complex as instructions for creating an entire presentation. For data sources, it draws from those that the individual user has access to within the tenant. Examples include documents stored in SharePoint or OneDrive, Exchange emails and conversations, Teams chats, PowerPoint presentations, Excel and Word documents, and more. It also is able to draw from supported third-party applications and data sources.

By way of example, here's just a sampling of what Copilot can do:

- Summarize email threads, team meetings, or long documents
- Compose email replies
- Synthesize new documents based on content in other documents, including PowerPoint presentations and Excel spreadsheets
- Analyze data in spreadsheets, spot trends and correlations, and generate visualizations
- Generate presentations from text documents, and also refine them based on user prompts
- Capture and assign action items from Teams meetings, or create agendas for future meetings

The ability to analyze, summarize and generate new content from multiple data sources has applications throughout an organization. Executives are keen on harnessing Copilot for their users and freeing them from rote and more mundane tasks. They anticipate a huge, positive impact from increased productivity and efficiency at the individual-user level and organization-wide. However, there are a few things to know.



## Some caveats for Copilot

Understanding these points is critical if you're an MSP taking on a tenant consolidation where use of Copilot is part of the end state.

First, in responding to a user's prompts, Copilot has access to anything to which the user has access rights — and that doesn't mean just the data and documents the user knows about. If access rights have been misconfigured, Copilot might respond by surfacing sensitive data that the user has access to, but shouldn't. Therefore, a thorough audit of permissions is strongly recommended before turning on Copilot after users have been migrated to the shared Destination tenant.

Second, if any data or documents that are stored in the tenant are outdated or no longer relevant, Copilot takes everything in the base data set for granted, and might draw from them in generating a response. A migration is always a good time to weed out old or unnecessary items, and that's a best practice for Copilot-enabling consolidations, too.

## MigrationWiz — an MSP's go-to-tool for consolidating tenants

While small, simple migrations that involve moving mailboxes and files of fewer than 100 users can be handled with scripted solutions, most tenant consolidations require a built-for-purpose tool with the scalability and flexibility afforded by MigrationWiz. It handles the task of moving users and the workloads they depend on for office productivity, communication, and collaboration; in the case of Microsoft 365, this typically means Outlook mailboxes, personal OneDrive files, shared files in SharePoint or Teams, and teams and channels in Teams. For MSPs who handle these migrations, MigrationWiz is the tool of choice. BitTitan offers several bundling options that align well with tenant consolidation projects, with per-user pricing that makes the cost of using a migration tool predictable.

## Fast, flexible and future-proof

MigrationWiz is a fully automated, 100% SaaS migration solution accessible anytime from anywhere, with migration project setup, management, and execution all controlled from a single, centralized interface. Proven over thousands of successful migration projects, it scales to handle enterprise-level projects and can move mailboxes and documents of hundreds of users simultaneously. All data is encrypted in transit and no customer data is stored. MigrationWiz conforms fully with ISO/IEC 27001 and ISO/IEC 27701 standards, the latter of which includes guidance for compliance with GDPR and the California Consumer Privacy Act (CCPA). BitTitan uses Azure data centers which are compliant with ISO/



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IEC 27001/27002:2013, SOC 1 Type 2 and SOC 2 Type 2, PCI DSS Level 1, FISMA, HIPAA/HITECH, CJIS, CSA CCM, FERPA, and others. The highly secure data centers that host the MigrationWiz solution are compliant with ISO/IEC 27001/ 27002:2013, SOC 1, Type 2 and SOC 2 Type 2, PCI DSS Level 1, HIPAA/HITECH, CJIS, CSA CCM, FERPA, and more.

Every tenant is different in terms of overall structure, groupings, policies, and permissions, and migrating users from the current state in the Source to a different end-state in the Destination is much more easily visualized and managed via a GUI as opposed to a collection of scripts. The point-and-click experience is highly streamlined and much appreciated by MSPs who have taken on a high-stakes project with exacting deadlines, and the extensive logging capability built into MigrationWiz is a major advantage before, during, and after the migration.

Because MigrationWiz is SaaS-based, it is constantly being updated as service providers have expanded their APIs and the requirements for migrations have changed. Born as a tool for migrating from on-premises to cloud environments, subsequent enhancements have included increased focus on tenant-to-tenant migrations, support for coexistence, Teams migration capability, and automated creation of identities in Active Directory. MSPs who adopt MigrationWiz can be assured they have a tool that is built for jobs today and ready for the future.

## Adaptable to handle any tenant consolidation scenario

MigrationWiz handles a wide variety of migration scenarios for moving mailboxes, documents, personal archives, and public folders between platforms, with support for Microsoft 365, G Suite, Microsoft Exchange Server, Microsoft SharePoint, Microsoft OneDrive, Microsoft Teams, and many legacy email systems. Building a migration workbench using first-party tools requires learning the idiosyncrasies of different toolsets to handle specific Source/Destination scenarios. MigrationWiz provides a single platform and foundation for tackling tenant consolidations of every flavor, with features that include:

**Advanced Options.** The many filtering and mapping options available such as Date Range Filtering, Folder and Recipient Mapping, and many others afford extremely fine-grained control over what you choose to migrate and when to migrate it, and allow you to create the ideal end-state in the Destination as you migrate the items.

**Even finer-grained control for power users.** While most migrations are easily handled through the GUI, the BitTitan® SDK gives access to the Command Shell and Management Console via scripts, and includes advanced PowerShell scripts that you can customize as needed.



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**Support for multiple migration strategies.** Pre-stage, batched migrations are often the preferred strategy for M&A migrations, but MigrationWiz supports other strategies including quick switch and big bang if they're a better fit for the specific business requirements.

**Batching for assigning users to groups.** Specific subsets of users, such as executives, key administrators or IT personnel may need to be migrated first for operational needs or business continuity. Batching is also a fundamental practice for making large migrations easier to control and manage.

### Addressing the challenges of tenant consolidations

The in-house IT leadership and teams may not have deep experience with user migrations, and they're being asked to perform the consolidation on top of their normal business-as-usual activities. Their IT infrastructure might not be up to handling the load of the additional activity, and accurately budgeting for the additional cost might be difficult for them. Some of elements of the MigrationWiz offering have clear benefits that speak directly to these concerns.

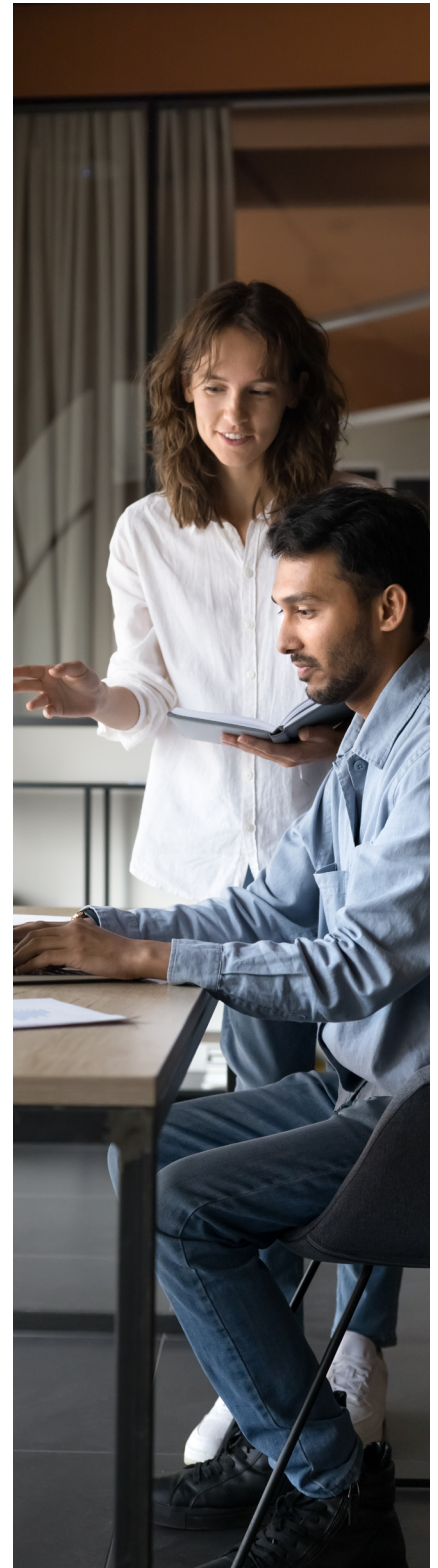
**Hosted SaaS** offering minimizes impact on the IT infrastructure. MigrationWiz is cloud-hosted and relies on Azure resources.

**Ability to pre-migrate or post-migrate items** before or after the cutover spreads the load over time and allows you to perform those parts of the migration during off-hours if necessary.

**Active Directory** migration tool creates the required identities in the Destination. This automated tool solves for the time-consuming challenge of manually creating the required identities, and allows you to selectively carry over the items, attributes, and objects that are relevant to the migration to create the desired end-state in the Destination.

**DeploymentPro™** automates the configuration of Outlook profiles in the Destination. It avoids the need to visit individual desktops or write custom scripts to set up user profiles, signatures, rules, and Autocompletes.

**Ability to handle email address changes** automates the process when naming conventions in the Source and Destination are different. Most likely users will have a new domain name on the Destination, and possibly the User Prefix naming convention will be different as well. The mappings available within MigrationWiz allow these changes to be made during the migration.





**Conversion between user and shared mailboxes** addresses the situation when roles and responsibilities need to be reassigned or restructured in the Destination tenant. MigrationWiz handles the conversion from single-user to shared mailboxes and vice versa during the migration.

**Migration of metadata including permissions** avoids much of the task of recreating them by hand, although some permissions to access files and folders such as those granted to external users of SharePoint and OneDrive will need to be recreated manually post-cutover.

## Key principles and the importance of assessment

There are two overriding principles to keep in mind when tackling a consolidation effort – or any migration, for that matter.

**The migration itself is only about 20% of the effort.** The bulk of the effort goes into assessing the Source and Destination environments, planning, and documenting what's going happen during the migration to set stakeholder and user expectations. The formal document is often termed an organizational change management (OCM) plan and having one in place at a sufficient level of detail is key.

**Stakeholder and end-user communication is fundamental to success.** It cannot be stressed enough: communication is the key to a smooth, successful migration that has users working productively immediately after cutover. That underscores the importance of a complete and well-detailed OCM document. Alerting users ahead of time that certain changes are actually anticipated and planned for lessens their tendency to raise alarms that might lead higher-ups to call a halt to the proceedings.

With proper planning, the technical piece of moving the data is a straightforward process; when migrations don't go well they're nearly always the result of insufficient planning or lack of the vital communication that must go hand-in-hand with executing on the plan.

### Assessing the environments

A thorough assessment is a vital preparatory step in any migration. In a tenant consolidation scenario, at minimum that means assessing one or more Source environments. Unless you're being handed a greenfield scenario and moving all the preexisting tenants into a net-new tenant, you also need to assess the Destination. MigrationWiz includes built-in discovery tools for assisting with the up-front assessment of the workloads to be migrated including mailboxes, documents, and Teams.



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Assessments are primarily about understanding the data assets at hand and the workloads to be moved, for creating an accurate migration plan which includes the migration group assignment plan, document-migration strategy, and timeline. This part of the assessment includes:

- Total user count and count by department or business unit
- Quantity of data associated with each of the containers including mailboxes, SharePoint, and Teams, and how they will align with the containers on the Destination
- Number of versions of a document to be migrated to the Destination and the permissions associated with them
- Folder count, hierarchy complexity, and overall item counts
- Initial timeline projection, which will need to be adjusted as a clearer picture of the migration emerges through the assessment process

A second layer of the assessment is around security parameters, group policies, workflows, permissions, and the other considerations that describe how the newly consolidated organization is expected to operate from a functional and security perspective. Even if the users in each tenant have been under same umbrella organization for years, policies may vary among the pre-existing tenants. The variations can cause headaches for the MSP who takes the heat from users post-cutover because they aren't able to work the way they used to. Among these are:

- Policies with regard to use of certain types of devices, or use of employee-owned devices
- Data retention policies
- Access, password requirements, and use of multi-factor authentication
- Policies regarding data storage on shared drives vs. on local user drives

Assessments are especially important when an organization has been on Microsoft 365 or another cloud platform for years. A formal and comprehensive assessment will likely uncover data that is not useful, no longer relevant, and/or not necessary to keep from a compliance standpoint. But beyond the data, assessments should extend to compliance guidelines, archiving policies, and permissions and access. An assessment can uncover users who are no longer in the organization, and licenses that are being consumed but no longer actively used. So in addition to planning for a smooth and successful migration, an assessment opens up opportunities. While it's certainly an option to migrate everything, selectively not migrating removes extraneous data, and you can also declutter the environment with the essential data housed in a smarter file structure. This translates to cost savings and a better user experience in the Destination.



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## Issues to watch for

Here are some of the key organizational differences to look for during the assessment that might need to be considered.

**End-user productivity and training.** It's possible that you're consolidating groups of users who tend to store documents within Teams with another set of users who make heavier use of hierarchical storage within SharePoint. Or a Source tenant might have customized document templates that they use regularly. Is customized training needed before or after the migration to bring the processes into sync?

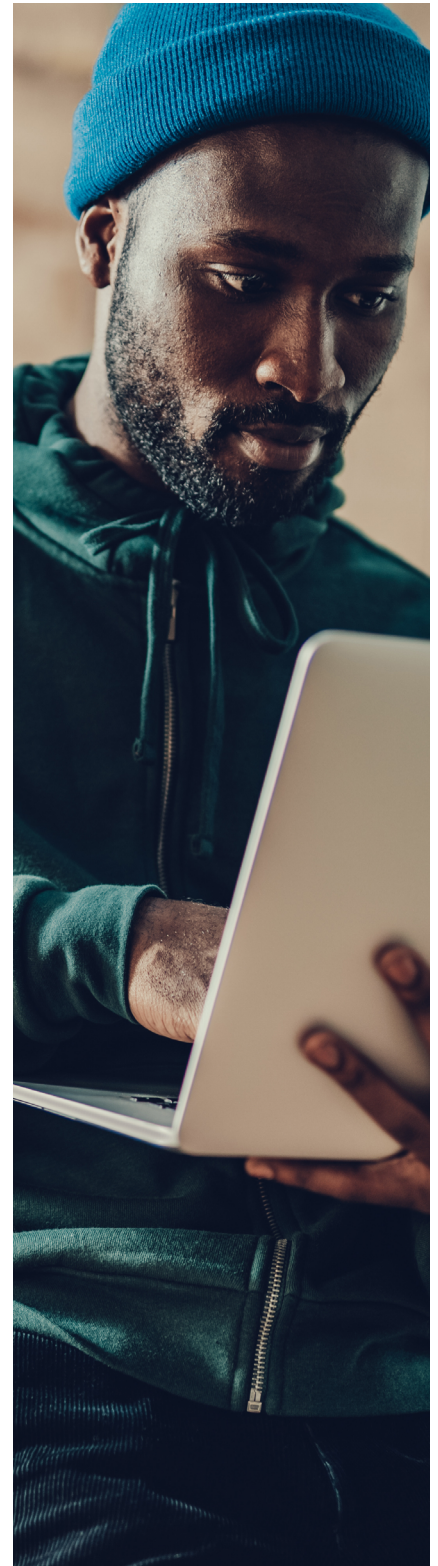
**Security and compliance considerations.** One of the Source tenants may have a requirement to meet a certain compliance level or certification, while others might not have had to meet such a high standard. Do permissions need to be adjusted as part of the migration so the tenant with more stringent standards will preserve their compliance posture?

**Email archive policies.** A Source tenant might have an established policy for archiving emails, while others allow users to hang onto their entire history. If the former's archiving procedures are enacted during the migration, users will be confused or upset when multiple years of email disappear. Those users will need to be informed ahead of time, or perhaps the consolidated tenant policy should be adjusted to one more amenable to all groups.

**Address conflicts.** Role addresses, proxy addresses, and individual accounts with similar names in the tenants need to be spotted and accounted for before the mailboxes are actually migrated, or there's a risk of populating a mailbox in the Destination with someone else's email.

**Addressing conventions.** This is an elementary example of the sometimes-thorny issues that come up when organizations combine. This has happened in larger migrations where one tenant has been using `firstname.lastname` for 20+ years, another uses `firstname_lastname`, and nobody wants to change.

**Federated accounts.** If any of the tenants has established guest accounts or uses federation to extend access to trusted business partners, it should be brought up early in the discovery process. That is especially true if a tenant being migrated wants to preserve the continuity of their operation straight through the migration with continuous access for business partners. Increasingly, organizations are using federation to enable collaboration with partners. Happily, there are also strategies that draw on federation, in conjunction with the ability of MigrationWiz to convert between mailboxes of different types, to make the migration smooth and seamless for users inside and outside of both organizations.



## An up-front investment in migration success

Investing in assessment upfront will pay dividends later when the heart of the migration runs, cutover happens, and users begin to experience the new environment. You need a thorough assessment to inform the migration strategy and in turn to communicate clearly, bring end-users on-board with what's going to happen, and set their expectations accordingly. Otherwise, missing items will raise a red flag, the issue will escalate, and you'll be forced to call a halt to the proceedings. Migration teams have learned this the hard way, as they've been forced to do a re-set, and put firm plans and milestones in place in order to get a stalled migration moving again.

## Planning for a smooth transition

Preserving business continuity before, during and after the migration is central to a migration strategy. Establish a standard practice of using migration groups, which are prevalent in large migrations not only for distributing the load over time, but also avoiding disruption to the business. A weekend of migration activity might coincide with a major product release that involves multiple departments, so that key individuals in those departments might need to be assigned to a follow-up group. Make the reasons for the group assignments and the scheduling and flighting clear as part of the communication plan.

The features and functionality in MigrationWiz are designed to complete high-fidelity migrations, so take advantage of them. The filtering and mapping capabilities allow doing pre-stage migrations that set up the ideal state in the Destination for each user, pre-populated with older mail and files that are unlikely to be needed before cutover time. MigrationWiz copies those items from the Source without impacting the current state of the Source, so the users can continue to work in the Source and they're not even aware that the items are being migrated. Filtering and mapping also allows new and recently changed items to be migrated immediately prior to cutover, usually over a long weekend, followed by one or more delta passes to bring over anything else that is new or changed.

Here are more specifics about the flexibility these options give you.

**Document versions.** You can configure MigrationWiz to selectively migrate a specific number of document versions whether stored in OneDrive, SharePoint, or Teams. In advance of the cutover, pre-migrate as many versions as you need for operational or compliance purposes. After cutover, subsequent passes migrate any revised documents and overwrite the pre-migrated documents with the newest versions.



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**File and folder mapping.** The mappings available within MigrationWiz allow you to move the files in the Source to a different or new location in the Destination. You can preserve the hierarchy of the Destination tenant, use the hierarchy most familiar to the majority of users, or welcome the users into the new environment with an all-new, better organized and decluttered file structure.

**Permissions.** MigrationWiz migrates metadata including permissions from the Source to the Destination. If users in one of the tenants need access to files and folders that originated in another, those permissions will need to be added manually after the cutover. Permissions previously granted to external users of SharePoint and OneDrive will also need to be recreated manually.

**User and domain name changes.** MigrationWiz will carry user permissions over to a new domain by matching based on the prefix or alias of the user name. If users will be given new prefixes or aliases in the Destination, those permissions will have to be added manually.

## An example migration cadence

Broadly speaking, one strategy that works well for large migrations is:

- Three weeks out: Begin pre-migrating data older than two months including older versions of files, older email, archives, and inactive Teams channels and conversations.
- Immediately prior to cutover: Run one more migration passes to move the most-recent email and documents.
- Post-cutover: Run one or more delta migration passes to bring over any new files, Teams channels and conversations, and finish off the mailbox migration to bring over the contacts, calendars, and newest emails.

The days leading up to the cutover, immediately after cutover, and during the delta passes are the most communication-critical points in the migration. Clear-expectation-setting delineates success from the perception of a bungled or disorganized migration. A good example is Autocompletes. If Autocompletes don't appear in the Outlook address bar, users leap to the conclusion that their contacts haven't migrated. Letting users know ahead of time is better than dealing with an upset user after the cutover.

## Copilot pointers – assessment and planning

Because of the potential for Copilot to retrieve sensitive items because of overlooked permissions or to surface outdated or irrelevant data, there are some items to pay particular attention to in a Copilot-driven tenant consolidation.



- Include a full permissions audit in the consolidation plan, which should be performed post-cutover before enabling Copilot.
- Assess user readiness for Copilot and include user training in the plan to close any gaps.
- Work with local IT and key stakeholders to identify any old, irrelevant or extraneous data and documents that shouldn't be migrated, or migrate them to a separate SharePoint store that can be walled off from Copilot access.
- Also consider establishing dedicated, Copilot-blocked SharePoint stores for extremely sensitive internal data such as HR and payroll.
- Get to know the organization's key use cases for Copilot, so that you can set the proper permissions in the Destination to support them.

## Executing and completing the consolidation

Even after all the planning is done, it's still necessary to verify that everyone in a group is ready before migrating them. A day in advance, give the business stakeholders one more chance to hold off migrating specific users because their work cannot be disrupted. Give everyone a chance to raise a red flag, and then check one last time before you execute.

### During the migration

Knowing the data sizes and identifying which data is most important for keeping the business running are the keys to developing a sound migration plan that will keep the business running while minimizing the chances that throttling may come into play. During the migration, it's important not to rely solely on a dashboard, even though that's tempting if the overriding concern is with meeting a deadline. Keep an eye on the logs including the data sizes, counts, and exception reports, and don't assume that all of the data in a batch has been migrated successfully. Errors that prevent files from being copied are inevitable. There can also be XML files, contacts, and calendar items that aren't translated to the Destination. End-users are quick to notice a few missing items after their data has migrated and complain. This is another place where end-user communication before and during the migration makes all the difference in setting expectations and keeping the finger-pointing in check.

### Post-migration tasks

Allow for time post-migration to remediate items that didn't move; here the extensive logging and reporting in MigrationWiz provides details on items missed and why they were missed, so any errors or oversights can be quickly remediated. There will undoubtedly be some items that need to be manually reconstituted because of API limitations. Users who are new to the environment may need to have access rights verified or changed, or file or folder permissions revised so they can access key items.



Even if your communication plan was executed flawlessly and addressed every potential issue, there are always individuals who don't pay attention and need some hand-holding. There's also a tendency to think if one or two items are missing, or something doesn't look or work the way it used to, that the entire migration was botched. Those individuals need someone they can talk to, who can answer their questions and give them some reassurance and direct them to any documentation or training resources that have been created for them.

You may want to leave the Source environment available for some short period of time while you're verifying the migration or in case remediation is necessary. If there was a pattern of items that failed to migrate, having the Source environment available may help you in investigating what happened so you can remediate them as a batch rather than doing one-off remigrations. Once the stakeholders are satisfied, you can de-license the Source.

### Copilot pointers – post-cutover

- Perform the full permissions audit, paying special attention to uncovering unexpected user access to sensitive information
- Provide training, to set user expectations for what Copilot can and cannot do, and guide them on writing effective prompts that support the organization's key use cases
- Consider enabling Copilot for a small subset of users to identify any overlooked issues before enabling it organization-wide

## Engaging with the Customer Success team

For an MSP undertaking any migration project, one of the best resources is assistance from the BitTitan Customer Success team, who bring vast experience in assisting with thousands of migrations. Among the services provided are:

- Guidance in the use of the tools in MigrationWiz, specifically during configuration and testing to set you up for a successful migration
- Migration strategy development, specifically with respect to what data moves and when it moves based on counts of users, groups, items, and data sizes
- Experience and knowledge about items that cannot be migrated automatically due to vendor API limitations, which should be communicated to users before the migration
- Advice on user communication to stave off complaints and unnecessary help-desk calls



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## Parting thought

Tenant consolidation is more than moving user accounts, files and mailboxes. It's a business decision grounded in strategic objectives and a vision for how the organization should operate. With MigrationWiz, you can realize that vision by creating the desired end-state in the merged tenant, and with minimal or no disruption to the users or impacts on operational continuity through the transition. Moreover, if Copilot enablement is part of the equation, you'll give your customers a bold and confident step into the new world of generative AI.



### Contact Us

All migrations start with MigrationWiz, a fully automated, 100% SaaS migration solution that can be accessed at anytime from anywhere. Sign up, configure, and initiate mailbox, document, personal archives, public folders, and cloud storage migration projects from a single, centralized user-interface. No special training, personnel, or additional hardware or software installation needed. One of the fastest migration engines on the market, MigrationWiz makes spinning up migration projects a breeze. An enterprise-grade solution designed to scale on-demand, MigrationWiz is easy to use, secure, and industry-tested — by SMBs and Fortune 500 companies alike.

To get started with your migration project, visit [www.bittitan.com](http://www.bittitan.com).