Migration from Zoom to Microsoft Teams in the Jobvite Application

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Executive Summary

This white paper outlines a structured approach for transitioning from Zoom to Microsoft Teams for virtual meeting integrations within the Jobvite application. It also highlights technical challenges encountered during the migration. The migration is aimed at streamlining communications, leveraging existing Microsoft 365 infrastructure, and enhancing security and collaboration capabilities. [1] [2].

1. Introduction

Jobvite, a leading talent acquisition platform, integrates virtual meeting tools to enhance the hiring process. As organizations increasingly consolidate technology stacks, many prefer Microsoft Teams over Zoom due to its seamless integration with Microsoft 365 services, robust security features, and cost efficiency.

The goal of this migration is to ensure a smooth transition with minimal disruption to ongoing recruitment activities while providing enhanced features and benefits.

2. Objectives

1. **Seamless Transition:** Ensure continuity of services during the migration.

2. **User Adoption:** Train and support users to maximize the use of Microsoft Teams within Jobvite.

3. **Enhanced Security:** Leverage Microsoft Teams' enterprise-grade security.

4. **Cost Optimization:** Reduce licensing costs by consolidating tools.

3. Current State Analysis

Zoom Integration in Jobvite

- **Features:** Schedule, host, and join interviews within Jobvite using Zoom.

- **Drawbacks:**

  o Separate licensing and administrative overhead. [3]

  o Limited integration with Microsoft 365 [4]

Microsoft Teams Capabilities

- **Features:**

  o Schedule and host interviews with real-time collaboration.

  o Deep integration with Outlook and other Microsoft 365 apps.[5]

  o Enterprise-grade security and compliance.

- **Compatibility:** Fully supported within the Jobvite ecosystem. [6]

4. Migration Plan

The migration was carried out under stringent timelines due to the expiration of Zoom licensing. A phased approach was adopted, encompassing Planning, Testing, Rollout, and Post-Migration Support

Phase 1: Planning

- **Stakeholder Identification:** Identified recruiters, hiring managers, IT teams, and candidates as key stakeholders.

- **Requirements Analysis:** Evaluated ongoing activities by the TA team to minimize impact.

- **Timeline Development:** Created timelines for testing, communication, implementation, and support.

- **Contingency Plan:** Developed a failover plan to mitigate risks.

- **Jobvite Coordination:** Notified the Jobvite support team about the planned migration.

Phase 2: Testing

- **Environment Setup:** Enabled and configured Microsoft Teams integration within Jobvite while disabling Zoom.
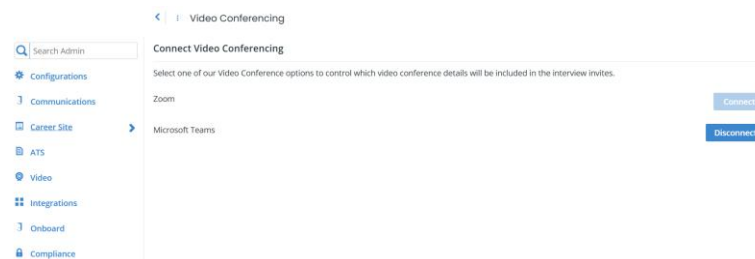

Fig 1: Jobvite Video conferencing configuration page

- **UPN Configuration:** Updated User Principal Name (UPN) IDs for an admin account and a test recruiter.

- **Workflow Simulation:** Tested key workflows, including scheduling and conducting interviews, to identify issues.

- **Training:** Developed training materials tailored to recruiters, hiring managers, and IT staff.

- **Communication**: Announced the migration timeline, contingency plans, and support resources to stakeholders. FAQs and helpdesk contacts were provided.

Phase 3: Rollout

- **Employee Data Update:** Updated UPN IDs for all employees in the Jobvite employee load file.

- **Integration Changes:** Disabled Zoom and enabled Teams for video conferencing.

- **Manual Synchronization:** Requested manual synchronization from Jobvite support to avoid login issues.

- **Full Transition:** Transitioned all users to Microsoft Teams and provided immediate technical support.

Phase 4: Post-Migration Support

- **Issue Resolution:** Addressed end-user login issues due to the UPN change.

- **Communication:** Sent organization-wide communication about the new login credentials i.e. upn@domainname.com.

- **Candidate Meeting Updates:** Requested recruiters to reschedule existing and future-dated Zoom meetings with Teams invites.

- **Zoom Decommissioning:** Terminated all Zoom licenses and integration with Jobvite. Archived any relevant data from Zoom for compliance and record-keeping purposes.

5. **Benefits of Microsoft Teams Integration**

   1. **Improved Collaboration:** Real-time chat, file sharing, and video capabilities [1]

   2. **Enhanced Security and compliance:** Built-in compliance with enterprise security standards. [7]
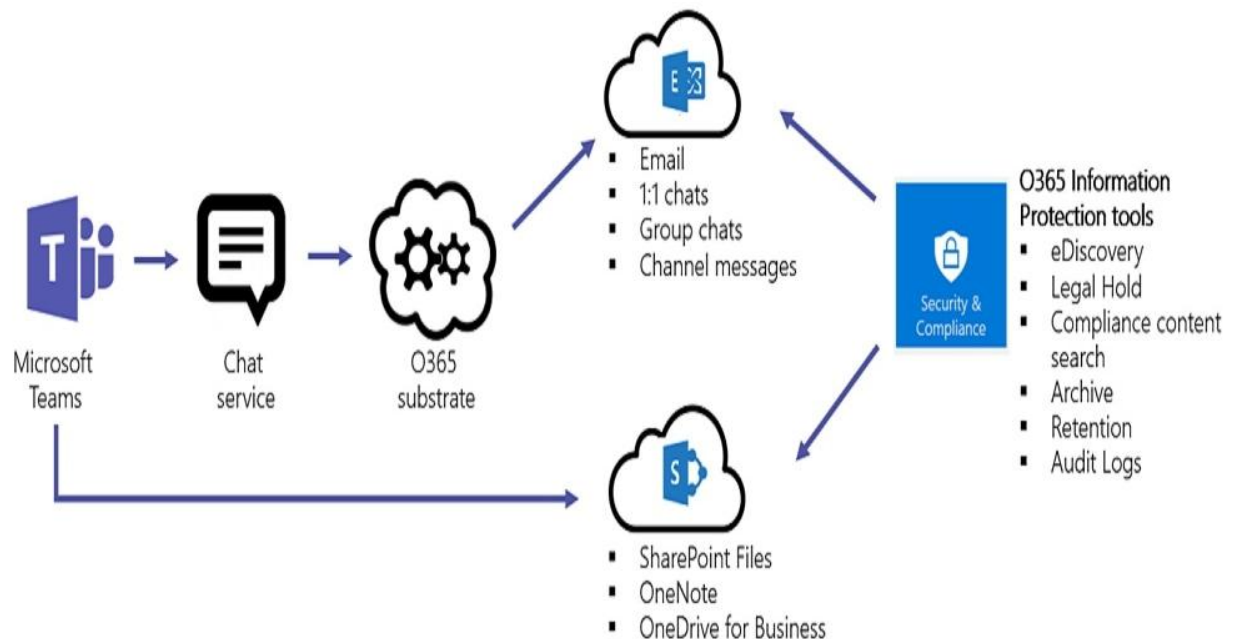

Fig 2. Microsoft Enterprise suit and security [8]

3. **Unified Ecosystem:** Seamless integration with Microsoft 365, reducing the need for multiple platforms [2].
4. **Cost Savings:** Eliminate redundant licensing fees.

6. Technical challenges

- **UPN Configuration:**

  - Microsoft Teams required UPN (upn@domainname.com) keys, whereas Jobvite initially used domain-based email IDs (firstname.lastname@domainname.com)for login.

  - Imported UPNs from Active Directory (AD) and updated Jobvite's employee data.

- **Field Mapping Adjustments:**

  - Updated the field mapping file to reflect UPN IDs.

- **Manual Synchronization:**

  - Forced manual synchronization at Jobvite to ensure timely updates.

- **Configuration Changes:**

  - Jobvite support updated internal configurations to use UPN keys.

- **User Education:**

  - Provided training and support for login changes to ensure a smooth transition to hiring managers and recruiters.

7. Other Challenges and Mitigation Strategies

- **User Resistance:** Organization has been using zoom for many years, so the switch form Zoom to Team's involved user resistance. We addressed this through training and clear communication (Harvard Business Review, 2023).

- **Technical Issues:** We faced technical issues post implementation like approval chain is not correct for some organizations, few financial approvers are missing from the approval chain etc. These were introduced due to UPN change and could not be identified earlier. We had Jobvite support teams on the standby to help us out with these vendor side technical issues and that helped us to resolve these issues quickly.

- **Candidate Experience:** As part of this switch, all existing and future dates Job interview scheduled needed to be canceled and scheduled new one with MS teams. These impacted candidates experience as well. Minimized disruption by proactive communication with candidates about rescheduled interviews.

8. Lessons learnt:

- **In-Depth Analysis**: A more thorough analysis could have identified the UPN issue earlier to avoid changes in the end system and could have handled it better at Source system.

- **Pilot Implementation**: A pilot rollout would have reduced post-implementation challenges.

- **Source System Planning:** With thorough analysis, there was an option to explore the change to be done at AD side to use lookup table for domain names and UPN ids so AD-level solutions could have minimized user impact. This need to be explored by AD experts so this can minimize impact for Jobvite end users and enhance user experience.

9. Conclusion

Migrating from Zoom to Microsoft Teams within Jobvite offers enhanced collaboration, cost savings, and security. Despite challenges, a structured approach ensured a successful transition with valuable lessons for future projects.

References

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