Messaging Architects™

Architected | Compliant | Secure

Email Migration in Easy
and Elegant Steps

Or How to Avoid the Pitfalls of the
Death by a Thousand Migrations Approach

Phone : (844) 360-4400

Email : info@messagingarchitects.com

About Your Email Migration Toolkit

Section 1: Email Migration Complexity.   In this section you will be introduced to various complexities involved in migrating email systems and data and the questions you should be considering and asking when choosing and email migration specialist.

Section 2: Building an Effective Email Migration Communication Plan This section provides important recommendations on how to build an effective email migration communication plan. You'll discover why clear and convenient communication is critical to the success of your email migration project. Identify the key stakeholders in your organization, decide what needs to be communicated, establish a communication timeline, and learn how to create tools and educational activities to facilitate communication. You'll also find ready-to-use email communication templates and migration surveys in this section.

Section 3: Building an Effective Email Migration Project Plan In this section, you'll discover why a detailed project plan is key to ensuring a successful email migration. Learn how to determine who will be a part of the migration project team, how to outline the steps required to implement your migration, how to create a communication plan, as well as what tasks should be performed pre- and post-migration. This section also includes important recommendations on how to develop your migration project plan.

Executive Summary

As email volumes continue to grow, email management has become a critical business, IT, and regulatory issue, driving a need for better email management solutions. A growing number of organizations are migrating from one email and collaboration platform to another to improve and streamline the exponential growth of electronic data. Other organizations are motivated to switch platforms in favor of technology changes that offer increased flexibility, functionality, and cost benefits.

> "Email volume in organizations is growing, typically by more than 30% annually and the average user receives 7MB of data per day via email." (Source: Debra Logan. Managing the Growth of Content and eDiscovery in an Uncertain Legal Environment. Gartner Summit, 2008)

Regardless of the reason for migrating to a new platform, undertaking an email platform migration can no longer be approached as an independent project on the IT department's To-Do list. It needs to be tied to a comprehensive strategy for simplified email risk and compliance management.
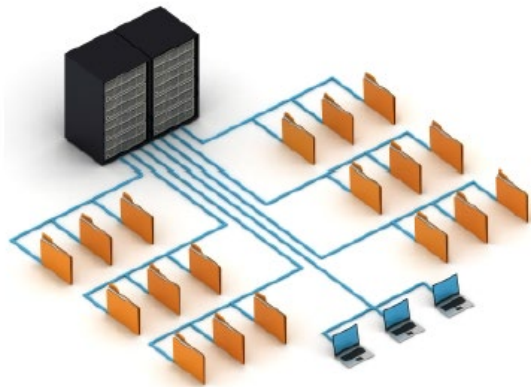
There is a strong case to be made about adopting an "archive before migrating" approach, which offers significant advantages and opportunities. In fact, implementing an email archiving solution should be a vital component of any email migration project. Archiving provides users with a better email experience by freeing up space inside a user's mailbox. Archiving is directly responsible for the overall improved performance of the email system by offloading old data from it. Archiving also helps organizations address compliance and legal eDiscovery requirements by making email easier to manage and search.

> "Growth in email storage has been identified in numerous Osterman Research surveys over the past two years as the most serious messaging problem facing organizations." (Source: Osterman Research, Inc. 2008)

The value proposition of using an archiving solution before migrating is further increased because it also provides organizations with a solution for managing email storage and eDiscovery requirements within the new email system post-migration.

What Decision Makers Don't Know About Email Migrations But Should

At first glance an email migration project may seem like a simple task or not a critical task. It isn't. Not only does email touch almost every person in the organization it is the most highly visible application for most organizations. In order to provide a seamless transition from one system to another, a migration involves many steps, such as user provisioning and data migration, training, change management, system provisioning, decommissioning, and licensing.

A migration to a new email platform is a major undertaking. Done without the proper tools, planning and experience, it is expensive, complicated, and risky. Moreover, it is never as seamless and transparent to end users as in theory. Inevitably, there are data loss and compliance breaches, both during and after the migration process.

There are different ways to Migrate to that new platform and your technology partners may recommend options like:

Out With The Old And In With The New

An inexpensive migration method at first glance whereby users are given access to a new system with no migration of email. They are provided continued access to the old system for an indeterminate amount of time and must reference both systems for a transition period that could be as little as 30 days and as much as indefinite.

This approach is not as inexpensive as it seems as both new and legacy systems need to be supported. Older email may need to be kept and accessed for business, legal and compliance purposes thus resulting in increased licensing costs as well as support costs not to mention two separate silos for discovery and information access.

Inevitably this approach has the highest user impact and long term cost expenditures.

Death by a Thousand Migrations

The traditional approach to Migrations in the past was to setup a coexistence between the two systems and gradually migrate users from one system to the other.

While this approach works well when moving between systems of same origin such as Exchange to Exchange or Office 365, it does not work well when migrating between two disparate systems.

Coexistence between disparate systems never provides full compatibility and the gradual migration of users from one system to another can create its own logistical overheads and extend the migration process over many weeks or months thus extending the costs of supporting two systems, coexistence issues and a lengthy migration of users.

Invariably this approach can have a large impact on users and user productivity depending on complexity and length of migration.

All Aboard Approach

One of the most successful migration methodologies for disparate system migration has been the single cutover approach allowing migration of tens of thousands of users in a single event.

While this seems a daunting and risky venture, it is in fact not only the least risky approach but also the most cost effective.

The mitigated risk comes from the methodology and the process.   Traditional gradual migrations utilize tools that perform direct mailbox to mailbox migrations, normally requiring the users to be logged out during this transfer of mail which means they usually happen outside of business hours.   Failures or errors have a direct impact on the client expecting to log into a migrated mailbox, forcing backout, rescheduling, remigration and user impact.

Messaging Architects takes a different approach to disparate system migration.

1. Pre-Migrate the data before migrating users.   This transfers data from source to target and allows for several points of validation such as error logs and spot checks prior to users being given access to the mailbox.
2. Migrate all users at once or in large batches in order to alleviate scheduling, user confusion, coexistence limitations and lengthy migration support.
3. Use a migration tool that allows for transparent access into both source and destination systems without requiring users to exit the system. This allows remediation and migration updates to

occur post migration with little to no user impact.

This approach provides the added benefits of:

- Pre-configuration of target system including all business processes, resources and meeting rooms.
- Manual configuration and validation of VIP uses to validate their mailbox content, setup automated rules and access right to executive assistants and other.
- Identify your issues and errors and remediate them prior to users being placed onto the new system thus dramatically reducing overall support and increasing user acceptance.

With proper planning, communication and orientation during the pre-migration stages, transition can be virtually painless allowing the organization to take advantage immediately of all collaboration features and benefits of the new system.

The approach provides the financial benefits of over all support costs for two separate systems and a slow transition, reduces licensing costs for having to maintain two systems.   It actually requires less resources and manpower to complete and has far less user impact with higher success rates.

What the IT Manager Should Consider About Migrations

Not all migration solutions or companies are created equal.   There are many Migration solutions out there and a lot of them are now providing Cloud based migration services or are providing a free migration service by vendor simply to get you onto the new platform.

We feel there are a number of questions you should ask of your Migration company.

1	If outsourcing the migration, is this work being outsourced off-shore?
2	Does this solution have an impact to my users and if so, what is that impact? Do they need to logout? Are there periods where they cannot use the system?
3	What about personal archives? Does the solution address processing of personal archive data?
4	Do you migrate all my data? Mail, Appointments, Tasks, Notes and Contacts?
5	Can you filter out certain messages from migrating based on parameters such as date , content or message type?
6	How long will this take?
7	What internal resources do I need to commit to this project? What is the anticipated data loss during this migration and do you provide forensics reporting to identify non-migrated messages?

Messaging Architects feels that your data is your own and should be protected as there is unknown and potentially sensitive information contained within.   We will therefore offer on premise migration solutions as well as cloud based in Azure that can be tied to a specific geo location.

Our use of connectors to target migrations of mailboxes without user impact is of prime importance and while no migration can ever be completely transparent to end users, Messaging Architects strives to identify those risks, communicate them and mitigate them where possible.

Messaging Architects is an experienced group of consulting engineers and project managers who use the right tool for the job.   We analyze your requirements and provide solutions around those requirements.   We will migrate all your content or a portion of that content, we can also screen that content and ensure that sensitive or potentially compromising information is not transferred. This can be critical for company acquisitions where the organization does not want to assume any liabilities that may be transferred from the acquired or merged company.

Our methodologies are designed to get you to the new platform as quickly as possible with minimal disruptions and loss of data which is generally less than 0.05%.   We conduct most of the work remotely and require limited resources on both our side and the customer side.

Archiving Email Data

If your goal is to migrate to an on premise system, you may want to consider deploying an archiving solution prior to the migration.

Email Bloat

Microsoft Exchange is a very robust and fault tolerant system but at a cost of increased storage demands due to elimination of single instance storage and dedupe.   Consequently Exchange email data bases and systems can grow at much higher rates than their predecessors causing organizations to continuously upgrade storage or seek to deploy mailbox quotas.

Archiving this content prior to the migration can reduce the need to migrate all the email, thus reducing costs and migration time frames. Archives can simply be transferred to the new system, thus allowing users and auditors with continued access to legacy data which was not archived and allowing continued archiving of new data to keep new systems in check from excessive growth.

Inactive Accounts

Another reason to archive mail would be to address the issue of retaining email for inactive accounts due to organizational retention policies or litigation hold requests.   For an on premise exchange system, the organization would require licenses and resources to maintain those accounts in the production system which generally could be a higher cost than a third party archive.

For Office 365 and Exchange Online, Microsoft offers clients the ability to migrate inactive accounts to the cloud and maintain the data for these accounts under Litigation Hold status without requiring a user license.   While this may seem an attractive offer, one should realize that the policy of free storage of inactive users in the cloud could and would likely change in the future.

Backup

Third party archiving also provides a physical backup of each individual email message to an isolated system and Messaging Architects archive solutions also allow for ease of recovery, allowing individual mail messages to be forwarded back to the user mailbox or to have the entire mailbox with folder structure restored from backup.

Cloud solutions like Office 365, provide very robust systems with redundancy and replication of services across different data centers but they do not backup your email data.   Data is simply replicated between systems which means that corruption and potential ransomware could also be replicated.

Since Office 365 accounts and retention is so tightly integrated with Active Directory there is always potential for inadvertent destruction of data through human error.   A third party archiving solution is not tied to local administrative events and therefore provides a great platform for warehousing of data.

Litigation Hold

Finally many solutions like Exchange and Office 365 perform in place holds on data marked for litigation hold which means this data is not supposed to be deleted as long as policy is in effect and people to manage that policy are trusted.   For added security; storing emails as physical copies on external archive system provides added security against spoliation.

Personal Archives

If you are migrating from an on premise system and didn't have strict retention policies or third party archive solution then you probably have been relying on personal archives to provide users with ability to save emails from their system mailboxes in order to keep the system growth in check.

Most organizations who deploy mailbox quotas, or force automatic deletion of emails after a specified period of time will have personal archive files residing on their network and local workstations.

Personal Archive files (PST for Microsoft) and (GroupWise Archive Databases for GroupWise) were introduced when concept of email was as a personal communication tool. Since that time, email has been at the forefront of legal litigation and Freedom of Information Legislation and the organization is responsible for not only safeguarding but providing this data as part of investigations.

Personal Archives scattered across workstations and network servers can be extremely difficult to find and costly to search and manage.

With a migration to a new system you should be evaluating what happens with personal archives. These decisions will be influenced by a number of factors including:

1. Does your organization have an email retention & destruction policy ?
2. Does the organization deal with litigation requests or is it at risk of having to produce evidence?

With personal archives you have a few options and should decide based on what is best for your organization but understand that the industry trend is to move away from personal archives.

1. **NOTHING:** If they are PST files you can just do nothing, the Outlook client will still read those files even if you have migrated to Office 365. If they are GroupWise archives, they will become inaccessible once you remove the GroupWise client and since they are encrypted and tied to the client, they can be difficult and expensive to access in the future.
2. **DESTROY:** If you don't migrate the archives and you don't provide access to them to users you may choose to simply destroy them so they are no longer a liability. You should refrain from this if you have a formal retention policy or under threat of litigation.
3. **WAREHOUSE:** You may choose to simply warehouse the archives by placing on disk or DVD and store for when and if are required. This is good contingency but can actually lead to higher costs to recover and scan than if you had migrated the data.
4. **MIGRATE:** Migrate this data into the target mail system (Online Archive of Exchange Online) or to a third party archive solution that provides good search and discovery functionality.

Ultimately the decision as to what to do with Archives is up to the organization but should be considered based on management of company records. Office 365 provides limited ability to import large volumes of PST data. Ask your vendor about personal archive processing as well as discovering and collecting archives that could exist almost anywhere in your network.

Third Party Archives

As an organization you may have decided to deploy a third party archiving solution for either space management and/or eDiscovery.

Now with a move to a new email system you may have to consider if that new system is supported by your current Archiving vendor or if you should simply transition away from the third party archive solution.

If you purchased your archiving solution to solve space management issues and you are migrating to an on premise system, then those space management issues will most likely still exist and one should look at compatibility of current solution with new systems.

If you are looking at migration to a cloud based system, then space management is probably no longer an issue and you will be able to use the new system for retention and discovery.   In this event you may be considering migrating your existing third party archive to that cloud email system for retention and discovery in a single location.

Organizations should carefully consider and review their current third party archiving solution for compatibility.   Third party archives can implement different archiving capabilities based on the product and internal requirements.

Journal Archive

Journal Archives are simply huge databases of indexed and unsorted messages.   The host mail system simply forwards a copy of every message sent or received to a single mailbox where the Archive system reads the messages and archives them.   In this scenario, the actual messages exist as attachments in a forwarded email message and are not collated by owner. This solutions is generally for compliance and 100% retention models where organizations wish to just capture all communications.

Mailbox Archiving

This form of archiving actually reads the email message directly from the users' individual mailbox and then sorts and collates the data based on the message owner.   This solution provide more granularity for capturing data, provides more complete message metadata including folder structures and allows better end user management of archiving. It also in a lot of solutions provides "Stubbing" or message shortcuts whereby the message in the live mailbox is replace with a shortcut to the message in the archive thereby reducing the overall size of the mailbox in the production system.

The method you use is important if attempting to migrate the data to Office 365 as Office 365 supports "Mailbox Archiving" and therefore if you were using Journal Archiving, you need a solution which can resort all those messages back into the correct mailboxes.

The other consideration that has to be made, is that with Journal Solutions, since a copy of everything was archived, restoring this content back into the user mailbox could mean that older items that have been deleted would be restored.

Make sure your migration partner understands the source and target systems and has the expertise and tools to not only migrate and convert those archives but reconstitute any shortcut message links.