Email Migration Handbook

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Introduction

Email migration provides some important benefits for schools and districts, particularly for those that are moving to the cloud or to a new email platform that is more scalable, cheaper or faster. However, it can turn out quite badly for those who don't manage the process adequately from start to finish and for those who don't get the expert help they need to manage the migration smoothly and efficiently. Before you begin the first step of a migration, get as much information from knowledgeable people as you can. Reading this ebook is a very good place to start!

Your Guide to a Successful Email Migration

By Michael Osterman

Email is the communication and collaboration lifeblood for the vast majority of organizations. For example, Osterman Research has found in numerous surveys that the typical professional engages with email nearly three hours on a typical work day–about 20% more than they engage with the telephone, instant messaging and social media combined.

Moreover, email continues to be the primary way that educators and staff members send files to one another, making email an essential tool for sharing and storing proposals, purchase orders, contracts and other critical information. The vast majority of email users are using email as much or more now than they were a year ago, while only a small handful of users are employing it less.

Email is arguably among the single most important applications that most schools and districts operate, but it is not static. Organizations need to migrate email from one solution to another as their needs change, whether it's a migration from one vendor's solution to a different vendor, between on-premises solutions from the same vendor, from an on-premises solution to the cloud or between cloud providers. The last two points are particularly important as decision makers are increasingly opting to deploy solutions in the cloud to reduce their IT infrastructure costs, redeploy IT staff for projects that provide greater value to the organization or to improve agility.

When an organization makes the decision to migrate its email, there are a number of important issues that it must address to ensure as smooth a migration as possible and to minimize the risks that are inherent in any email migration project.

Maintain the Integrity of Email

Much of the content in school and district email systems consists of records that are essential to an organization: conversations among colleagues; communications with entities outside the school or district, such as service providers and parents; employee records; and other critical information that may be needed for legal, regulatory or other needs in the future. It is essential that a migration from one email solution to another not only prevents this information from being altered or deleted, but that the chain of custody for this data is maintained throughout the migration process. An inability to prove the authenticity of email—because a migration changed the information or its metadata—can put an organization at serious risk of non-compliance.

Address Deficiencies in the Current Email Solution

Every email system has problems, whether it's issues with server configurations, mailbox corruption or stability. These issues need to be addressed before migration begins, otherwise they will likely manifest themselves at some point during the migration process.

Engage Your Users

We need to make the assumption that your organization has an archiving solution that captures/copies email, attachments and metadata and other data directly from the target email server(s), which is moved to stand-alone archiving servers where it's indexed and made searchable. Assuming that an archiving solution is already in place, users should be asked to rid their mailboxes of unnecessary content and file their attachments appropriately to minimize the amount of content that needs to be migrated.

Our research has found that many users are "pack rats," using the organization's email system as a sort of filing system for their attachments, contacts, personal communications and more. Moreover, users should be aware of when their mailboxes will be migrated and trained on any changes in the new system so that surprises—and lots of calls to the help desk—can be avoided.

Understand Your Network Constraints

Available bandwidth can seriously constrain a migration effort that relies on local area networks (LANs) and the Internet to move data. The amount of network bandwidth available will be important in helping decision makers plan key elements of the migration, such as how many mailboxes can be migrated at one time, when the migration can occur and the impact that the migration will have on other network-dependent processes, just to name a few.

Develop a Plan for Future Archives

Most organizations have archived data that they need to retain for long periods, either to remain compliant with their legal or regulatory obligations or simply to satisfy best practices. When migrating from one email system to another, some important questions about archived data need answers.

- Do you want to maintain an archiving solution for legacy email and a different one for new email?

- Do you want to migrate existing archives into a new archiving platform?

- Are you prepared for the potentially dramatic increase in storage that might be required when migrating data into a new platform?

Find Some Good Help

Even at its best, email migration can be a difficult task fraught with a number of risks and pitfalls that cannot be fully anticipated. To make matters worse, the typical organization only migrates its email once every three or four years, if that often, and so never develops the skills to develop expertise in the migration process. Consequently, for the vast majority of organizations that are considering moving to a new email solution, it is essential to use a third party that is well versed in planning and executing email migrations—and that does so on a regular basis. ∎

Getting Started: Important Email Migration Considerations

Switching email service providers (ESPs) is a pretty big undertaking, requiring a considerable amount of IT resources and often resulting in unexpected delays and headaches. There are many other important considerations you should take into account when planning an email migration, ones you might not have thought about…until now.

The start of your email migration journey will likely consist of setting up your users in a new ESP and getting all of your settings the way you want them. A third-party vendor can help provision users from your old ESP to the new one (e.g. via Active Directory). Whether you're moving from Exchange to Office 365, Office 365 to Gmail, etc., a vendor partner can make your email migration a lot easier by assuring your user accounts get provisioned correctly.

You'll also want to decide when you're going to make the switch and how you're going to get all of your data to the new ESP, whether that's the email PST files, contacts, calendars or anything else associated with the user accounts. By choosing the right vendor to do the migration for you, you'll be able to move all of your data from an old ESP to the new one before you make the mail exchanger (MX) record change and start sending email to your new provider.

Next, you'll need to decide if users will get new login credentials or use the access privileges from your old ESP. Either way, a vendor that specializes in enterprise email migration can ensure that users' mailboxes get populated with all of their legacy data, which goes a long way in making your users feel as comfortable as possible with the switch.

One of the final steps when doing an email migration of any significant size is to follow validation processes to assure everything went as expected. Often—especially with free solutions—validation will be entirely your responsibility, or it just won't exist at all. A third-party vendor that specializes in email migration should have extensive validation and testing procedures in place. Don't accept verification procedures from any vendor that insists on limiting the number of validated users or only validating up to a certain amount of data.

Lastly, any email migration project should also involve your third-party archiving solution to assure that email to new ESP gets archived properly.

⊕ **Has your organization encountered one of these scenarios when migrating email?**

☑ Changing your email domain

☑ Switching from a hosted email service to a different hosted email service

☑ Converting from an on-premise email system to a cloud-based email provider

As mentioned earlier, employees still use email daily for communication, which is why it's essential to design a coherent email migration plan that keeps your organization running with little to no interruptions. Whether you're moving to a different campus or migrating to the cloud, it's important to plan carefully.

, *5 Email Migration Tips to Keep Your Organization Running Smoothly*, for advice on how your company can complete a more successful migration.

Exporting Options Are Important In Your Email Archive

Most of us think about what goes into an email archiving solution, but let's consider what comes out. When evaluating archiving products, it's best to confirm that you will have multiple exporting options for litigation and, inevitably, migration purposes.

Google Vault customers feel pain perhaps more than anyone, because they can only export to a compressed mbox file. Many archives, eDiscovery products and litigation support systems don't support mbox and/or add costs to your overall data governance and retention efforts. After expanding the compressed mbox file and preparing it for import, the data will likely need to be converted to another format, such as a Personal Storage Table (PST).

Another point to consider is that many archiving products, including Google Vault, have issues with large, time-consuming exports. For instance, in Google Vault, if an export exceeds 24 hours, the process stops, providing you only partial results and requiring you to continue the export manually.

To make matters worse, Vault only exports up to 10 GB in an mbox file. If your export is larger, Vault creates multiple mbox files, which is an inconvenience for both you and the party for whom you're preparing the data. If waiting several days for an export to complete isn't bad enough, remember that you're repeatedly checking in on the process to make sure that it hasn't stopped.

With the right third-party archiving solution for email products like Gmail, Exchange, and Office 365, you shouldn't have to worry about these exporting limitations. While PST is one very common format, you might be asked to produce EML, CSV or PDF files. Telling lawyers or a judge that they'll have to wait for data to be converted, or that the requested file type isn't an option, can come at the cost of your time, money and reputation.

Export As ▼
PST
EML
CSV
PDF

Although PST is the most common format, choosing a provider with export options such as EML, CSV or PDF files provides more flexibility, which can lead to significant cost savings.

Email Migration Tips to Keep Your Organization Running Smoothly

1. Purge Your Mailboxes

Cluttered mailboxes are common to organizations of all sizes. Reduce the amount of data by asking users to reduce their mailbox size. This simple exercise can drastically improve the speed of your email migration.

2. Know Your Data

How familiar are you with the data you'll be paying to migrate? Are you planning to migrate email from consumer domains like walmart.com and aol.com? Will you be paying to migrate your employees' email messages that contain the latest Groupon offers?

Understanding your data will help you build an accurate project timeline. Typically, the type, and size, of email messages vary significantly. For example, a 5-GB mailbox with 500 items, each with 10 megabytes of attachments, might migrate faster than one 5-GB email box with 100,000 smaller items.

It's also critical to consider how you're hosting current data. There are frequently limitations that make it trickier to migrate data due to hardware specifications, back-end maintenance tasks and end-user workload. For example, do you know that Google limits the volume of migrated Gmail data over a given period?

3. Know Your Network

Does your network environment have any constraints? Identify the available network capacity and determine the maximum upload size of your network to figure out the time it will take to migrate. Remember to identify what else could affect your network capacities, such as scheduled maintenance and backup utilities. Also, don't forget to contact your ISP to confirm your allocated bandwidth and get details about any restrictions.

4. Communication is Key

It's wise to communicate your migration plan and schedule to all end-users who will be impacted by the email migration. Plan your migration strategically and for a time when email activity is at its lightest within the organization.

5. Get Some Help

If you are migrating your email to the cloud, it is quite different from other kinds of traditional email migration. Consider using a third-party email migration service to help with this complex process.

About Gaggle

Gaggle ensures the safety of students through early warning detection of self-harm, drug or alcohol use, cyberbullying, pornography and other harmful situations. By combining machine learning technology with our expert Safety Representatives, schools and districts can create safe digital learning environments for communication, collaboration and learning.

Gaggle continues to innovate, also providing school and district websites, affordable archiving services, safe communication tools and professional development on Gaggle products, G Suite for Education and Office 365.

About Osterman Research

Osterman Research provides timely and accurate market research, cost data, cost models, benchmarking information and other services to technology-based companies by continually surveying IT decision-makers and end-users of information technology. We analyze and report this information to help companies develop and improve the products and services they offer to these markets or to internal customers.

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