

How to move your email to Office 365

8 vital considerations for businesses moving to Office 365



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INTRODUCTION

You're considering moving your email to Office 365. Congratulations! Office 365 offers significant advantages, including reduced costs, the ability to access email and files from any location on any internet-connected device, easy collaboration, greatly simplified systems management (eliminates on-premises servers, updates, patching, etc.), a predictable monthly cost, and more.

Moving your email to Office 365, however, is much more complicated than simply copying your email data to Office 365. To ensure a seamless switch—and avoid email downtime, lost data, or interrupted productivity—there are many issues that must be addressed and tasks that must be orchestrated.

A move (migration) to Office 365 is no less complex than moving your entire business to a new, more expansive physical location. And because many aspects of an email migration may be less visible or obvious, this move usually requires even more informed planning and preparation.

This guide will alert you to eight of the most important issues that any small to medium-sized business (SMB) should consider when planning and performing a migration to Office 365.

While each section covers a specific aspect of an email migration, each should not be considered in isolation, as many of the issues overlap and impact one another. Rather, they should be considered together across your approach to the entire migration project and when selecting any tools or IT partners to facilitate the move.



#1

TAKE A COMPREHENSIVE INVENTORY

What's in your source email environment?

- Understand exactly what you're migrating
- Identify factors that may cause problems
- Consider using sophisticated email discovery tools



Moving your business to a new location requires careful planning, including taking an inventory of every item to be moved and ensuring that everything, from contacting utility companies to updating contracts and changing the contact information on your website, is addressed. Without a comprehensive inventory of every aspect of your business that must be addressed, the entire project may be delayed or derailed, costing time, money, and productivity.



Every email migration to Office 365 is different, and each introduces its own variables and complexities that may negatively impact or be impacted by the migration. Many of these variables may be hiding in your source environment. The first part of your preparation must therefore be to gather as much data as possible. Without a thorough inventory, you may run into problems that could have been avoided.

Questions to cover in your email migration inventory

- Do you have tools that provide comprehensive visibility into your email environment before you get started?
- Are there underlying problems, such as server health issues, that need to be addressed before the migration begins? If so, how will you address them?
- How will your hardware, software, workstation, and network function in an Office 365 environment?
- Do you have network configurations or settings that may interfere with the migration?
- What is the protocol of your source server, and how will that impact the migration?
- Do you have any third-party applications that are integrated with your existing systems that may interfere with the migration?
- Do you need to clean up or make changes to your Active Directory?
- Is your data ready for a migration?
- Do you need to change your password expiration policy or current password requirements?
- Are there any other technologies that touch your email environment (e.g. printers that receive/send email)?

While Microsoft offers some free basic tools to assist with the data migration, these tools are not designed to uncover many of the issues which may delay or disrupt the migration process. We use sophisticated tools that are designed to discover the most important aspects of your source email environment, ensure readiness for Office 365, and provide insight throughout the migration process so that issues can be addressed before they can disrupt the process.

#2

GET ORGANIZED TO OPTIMIZE YOUR NEW WORKSPACE

How can you optimize your email in Office 365?

- Learn how to make the most of Office 365 features and functionality
- Don't move what you don't need
- Organize what you're moving, based on where you're moving



When you move to a new location, you can just throw everything into boxes and move. But as long as you're packing everything up, why not go through it all? Get rid of what you no longer need, and think about how to organize it all for your new location. The more you know about that new location, the more you can optimize that new space.



While it's generally possible to migrate your current email data to Office 365 as is, the move is a great time to clean up your email, so you only move what you need, and everything is prepared to optimize your email experience in Office 365.

Questions to consider to optimize your email in Office 365

- How well do you understand the features and functionality of Office 365?
- Are you prepared to provision the Office 365 tenant in a way that makes the most of Office 365, including the use of Shared Mailboxes, aliases, Public Folders, Distribution Groups, etc.?
- Are there any organizational policies you want to make? For example, do you want to standardize email prefixes across your organization (e.g. `firstname.lastname@domain.com`)?
- Are there any mailboxes that you don't need to move? It makes no sense to move, pay for, and manage unused mailboxes in Office 365.
- Do you want to retain the data for any unused mailboxes? If so, you can convert those mailboxes to Shared Mailboxes in Office 365.
- Do you know how to configure and optimize Distribution Groups and non-user mailboxes, such as Shared Mailboxes and Resource/Resource Equipment Mailboxes?
- Do you understand the different Office 365 license types, features, and costs? In many cases, different licenses are appropriate for different roles within an organization.

Let us show you how we can help you optimize your company email in Office 365

#3

MAKE SURE EVERYTHING IS READY BEFORE YOU MOVE IN

How will you be sure everything is set up for your workers to be productive from day one in Office 365?

- Understand how you will sync data and mailbox changes throughout the migration process
- Identify how you will migrate settings and Outlook profiles
- Determine how you will know everything is ready in Office 365 before you move in



When a business moves to a new location, the transition team usually works hard to ensure that when the employees walk in the door on day one, everything is set up and ready to go. All furniture is in place, computer systems are functioning, boxes are delivered to the right locations, etc.



You'll want to take the same approach to your migration to Office 365. Before your company switches to Office 365, wouldn't it be nice to know that everything will be there and set up just the way you need it, so that as soon as you open the door to Office 365 you and your people can get right to work?

Questions to ensure everything is set up in Office 365 before you move in

- Who will be responsible for syncing data?
- How will you know when all your data has been synced to Office 365?
- Will your data syncs address last minute mail changes (e.g. moving an email to a new folder) so everything is right where people need it?
- How will you move data that is not on your current email source server? Depending on your source email environment, there may be some or a lot of data stored on end users' local machines. This may need to be moved manually.
- How will you migrate settings like Autocomplete and Inbox Rules?
- How will you recreate Outlook profiles in Office 365 to match each user's previous email experience? Or will end users need to set these up again?

There are many tools that can be used to migrate server data. However, many require manual involvement and management to initiate and manage batches of data to be synced. With most tools, the migration of local data and the creation of Outlook profiles must be done manually, which can be cumbersome, time-consuming, and error-prone.

Our combination of automated tools and migration expertise ensure that everything is moved into Office 365 and set up so your workers can be productive from day one.

#4

MAKE SURE YOUR ASSETS ARE COVERED

How will you ensure your email data is backed up?

- Understand the risks of data loss in Office 365
- Understand how a cloud-to-cloud Office 365 backup provides a simple, but necessary foundation for data protection
- Determine the right backup solution to protect your Office 365 data from day one



One critical thing you must do when moving your business is to ensure that everything at your new location is insured in case of loss. Being properly covered gives you peace of mind that your business can continue to function and recover quickly, even if a disaster should strike.



Many assume that Office 365 includes full backup services because the data is in the cloud. But it doesn't, and many have had a rude awakening when data has been lost or corrupted and they can't get their data back. Therefore, as part of your move, it is important to understand and address the risk of lost, deleted, or corrupted data in Office 365.

Risks of data loss in Office 365

The vast majority of data loss—75%—happens when people delete content. Whether the deletion is intentional, accidental, or malicious, once something has been deleted from Office 365 you may not be able to recover it at all.

- Exchange Online: Deleted items are permanently removed after 14 or 30 days, depending on settings.
- SharePoint Online: Site Admins can permanently delete SharePoint data, making it immediately unrecoverable.
- OneDrive for Business Online: End users can permanently delete data, making it immediately unrecoverable.
- SharePoint and OneDrive for Business: Ransomware or other malware can corrupt or encrypt your data in Office 365, making it useless or requiring you to pay the hacker to unencrypt the files.
- Groups and Teams: More and more data is moving from traditional collaboration tools like email to new and evolving apps and services like Groups, Teams, and Modern Team Sites. Ensure this growing repository of valuable business data is protected.

Questions to ask when determining the right Office 365 backup solution

- What would happen if a vital employee accidentally or intentionally deleted all their email with attachments?
- How long would it take to re-create data that is deleted or corrupted?
- What data needs to be backed up?
- How can I be sure that the data is backed up from day one in Office 365?

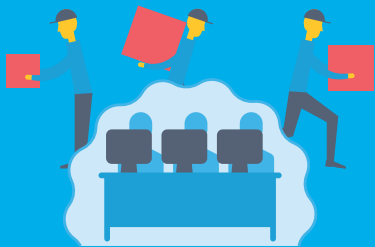
Office 365 provides some data protection features, but the details depend on the license type. And most important, no license provides a true backup solution in which lost or corrupted data can be quickly restored right back where it was. When you move to Office 365 it is therefore critical to put a backup solution in place to protect your data.

#5

KEEP YOUR PEOPLE FOCUSED ON THEIR WORK

How will you minimize the disruption of the moving process on your workers?

- Understand the technical expertise of your end users
- Determine how much responsibility for the move you want them to take on
- Consider options to minimize or eliminate end-user involvement



When moving your business to a new location, the less your workers need to be, the better. Limiting the disruption not only keeps your people productive, it also improves morale and reduces the perceived “hassle factor” of the change.



Likewise, in planning an email migration to Office 365 you should give careful thought to how the process will impact your workers, as most Office 365 migration approaches require at least some participation.

Questions to streamline end-user involvement

- Do your end-users have the time and skill required to configure an Outlook profile to connect to Office 365?
- Do you have clear instructions and processes to engage end-users?
- Do you have a way to effectively to monitor and manage the completion of end-user actions to ensure a seamless switch to Office 365?

We offer a variety of options to minimize end-user involvement and ensure all actions are performed in a timely manner, including:

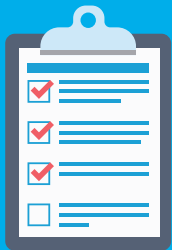
- Impersonation to access source data without end-user involvement
- Deployment technology to remotely install needed migration tools on desktops
- Automated end-user communications that deliver timely, clear instructions to ensure action
- Real-time monitoring of end-user participation to ensure a smooth transition for everyone

#6

MAKE SURE CLOSING GOES OFF WITHOUT A HITCH

Do you have what it takes to pull off a seamless switch to Office 365?

- Ensure a seamless switch to Office 365
- Understand the DNS changes that must be made in a timely manner to maintain mailflow
- Perfectly orchestrate every task that must be performed at the time of the switch



You may have planned the perfect move, but if there is just one missing signature, an incorrectly-filled-out form, or missing paperwork at closing, it can delay or derail your move.



With a migration to Office 365, it all comes down to the moment when mailflow switches from your source server to Office 365. If any required task is not done properly at exactly the right time, all kinds of problems may ensue, including mail flow interruption, Outlook profiles not switching to Office 365, or worse.

Questions to ensure a seamless switch to Office 365

- Do you understand all the complexities of DNS, including the changes that need to be made to both public and local DNS?
- Will your people know how and where to access their email during the switch?
- Will you have to schedule the migration on a weekend to ensure any problems can be resolved before Monday morning?
- Do you know what to do if critical data isn't in Office 365?
- Do you have a plan to ensure Outlook profiles are set up, local data is migrated, and all mail changes are synced, so end users barely notice a change has occurred?
- Do you know how to troubleshoot mailflow interruption or other problems that may occur when the switch is made to Office 365?

Every task that must be performed during the switch to Office 365 is critical. Our tools and expertise ensure a seamless switch with no mailflow interruption, no end user confusion, and minimal overall impact.

#7

EXPECT THE UNEXPECTED

Are you prepared to troubleshoot any unforeseen issues that may arise throughout the move?

- Have a plan to identify and address problems as they arise
- Be prepared for unanticipated issues
- Ensure you have the troubleshooting expertise for every technology that is involved in the migration process



No matter how much you plan or prepare, there's a lot that can go wrong when moving your business to a new location. The closing date may be delayed by the circumstances outside your control, there may be problems getting the utilities hooked up, that new conference table might not fit through the door of your new conference room.



Every migration to Office 365 is different, but having to address unforeseen issues is common to most. No matter how prepared you are, the complexities of source server configurations, third-party tools, DNS changes, source server health, and network issues, etc. can disrupt, delay, or otherwise negatively impact even the most comprehensively planned and implemented migration project.

Questions to be prepared to address unforeseen issues:

- Do you have knowledge and troubleshooting expertise across all the technologies described throughout this eBook? Do you have knowledge and troubleshooting expertise across all the technologies described throughout this eBook?
- Do you have a strategy or tools to identify and address potential issues before they have a chance to derail the move?
- Do you have previous Office 365 experience that has prepared you to identify and address common issues in that new email environment?

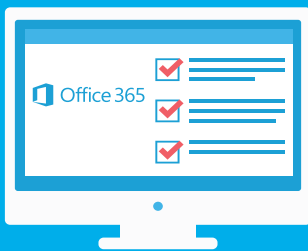
Because there are so many things that can go wrong with so many variables in a migration project, we can't say that we've seen it all. However, our tools and expertise have equipped us to identify, diagnose, and troubleshoot almost any issue that may arise.

#8

MAKE THE MOST OF EVERYTHING THE NEW PLACE OFFERS

Will your people know how to make the most of Office 365?

- ❑ Train end users on all the features of Office 365 that will empower their productivity
- ❑ Provide documentation to help end users learn more about the benefits of Office 365
- ❑ Have a plan to provide support during and after the move



Your move to your new location is complete, and you're thrilled with all the amazing amenities that are now available for your team. However, if you don't provide at least a tour of the facilities, let alone training and support on using various machines, networks, and processes, your company will miss out on much of the value you anticipated with the move.



One of the main reasons many organizations move to Office 365 is to take advantage of all its productivity features. Perhaps that's what convinced your company to make the move. But if you don't provide training and support, those productivity features may go unused or may result in chaos if people don't know how to access their email, set up their calendar, or use basic collaboration features.

Questions to help your people make the most of your move to Office 365

- How will you "sell" your people on the value of Office 365 for their specific role?
- How will you educate your end users in advance of the move?
- How will you train end users on the features that will be most meaningful and productive for them?
- Do you know how to work with people who may be on vacation during the migration?
- How will you provide ongoing training and resources for continued productivity advancement?

Picture this: Just as you are about to start celebrating your successful move to Office 365, someone can't figure out how to access their calendar; the CEO's email isn't showing up on her smart phone; or the Operations Manager doesn't understand the difference between OneDrive for Business and SharePoint. This can make even the most technologically successful migration feel like a fiasco.

Here is another place where we can be an asset. We provide documentation, resources, and training on how you and your employees can hit the ground running in Office 365 and take advantage of all the productivity benefits it offers.

CONCLUSION

As you can see, an email migration to Office 365 involves a lot of moving parts, with many questions and issues to address. Like any major move, even minor details can undo the most careful planning and preparation.

If you do not have the expertise or bandwidth to handle all the tasks and variables of a successful email migration, let us show you how our experience, tools, and expertise can make what is often a challenging, disruptive move, a simple, safe, and seamless switch for you and your entire workforce.

We make it:

- **Simple**, so you can focus on your business
- **Safe**, with little risk of anything being lost or left behind
- **Seamless**, with no mail downtime and an easy transition for end users



Business Change Isn't Always Easy

Providing an expanding array of enterprise-grade features and functionality, Office 365 makes it easy for organizations of any size to create and share information. While some companies have already made successful transitions to cloud-based software like Office 365, many remain anxious about the migration process itself. With this in mind, Prophet Business Group has specifically tailored our approach to be accommodating of the most common migration roadblocks.