THE 2016 **EXCHANGE** MIGRATION SOLUTION SELECTION **GUIDE**

As an IT administrator planning an Exchange migration at your company, you are presented with many options but how do you know if they are right for your business and unique situation? Our helpful guide presents some of the key points you should know before making a selection.

PRIASOFT™

Introduction

The migration of data, regardless of type, prompts many fears, great cost, and potentially endless hours of manual intervention and support. The task of data migration comes before almost all IT managers and directors at least once in their career, often multiple times. Regardless of the period of occurrence, no single one is ever the same nor is it completely flawless.   Many hours of selecting, testing, implementing, and supporting of a migration are consumed, and the duration is usually reflective of the criticality of the data in question. The experts at Priasoft have created this ebook to support your selection efforts and assist in navigating the complexity of Exchange migrations.

Before you begin

There are many solutions out there, no doubt. How much of that software considers the impact on OVS? (Original Vendor Supportability). Be sure to ask your potential ISVs and Solution Providers if their products/solutions subscribe to OVS, meaning that the technology decisions and implementation of the product/service are supportable by the Original Vendor. Failing to consider this can place you in the dreaded "Vendor Fight".

A note about Microsoft Exchange

Microsoft Exchange, as a topic of migration, is almost always the MBC Application (Most-Business-Critical) in an organization. The availability and responsiveness of the email system is felt by every user, including top decision makers. With this in mind, the selection of appropriate tools and solutions becomes equally critical with regards to the migration of this data. Selecting the wrong migration solution can lead to missed deadlines and increased costs as the migration process starts and continues. It is especially important to ensure that testing truly reflects the requirements of a production environment (test labs are often never the same as production). Success of a solution in a test environment, which is then used to make a decision on solution selection, can lead to a costly maneuver. As the process is piloted in production, new and unforseen obstactles are discovered, increasing timeline and costs. Most of these are often discovered after the purchase and selection has been made.

DEPLOYMENT

Deployment, often discounted as 'it has to be this way', should be carefully considered. No vendor can say that there is only one way to deploy a solution, nor should they. There are many factors you must consider.

Infrastructure Requirements

When it comes to Exchange migration solutions, "simple is better".

When choosing a migration solution, the infrastructure requirements are often taken "as is". These requirements are driven by a vendor's need to force the environment to work with the solution. A great solution should require the smallest infrastructure footprint necessary to perform reliably and be flexible enough to work with many common environments.

Be wary of complex and multi-resource solutions. The more complex a solution is to deploy, the more likely it is to have issues. Systems with lots of moving parts, especially ones dependent on additional systems can be adversely affected by environmental changes. Consider a system that requires a database server, solution consoles, and a backend server and how a single, 'Company Policy' based update to the database server could cause the whole solution to have issues that were previously unapparent.
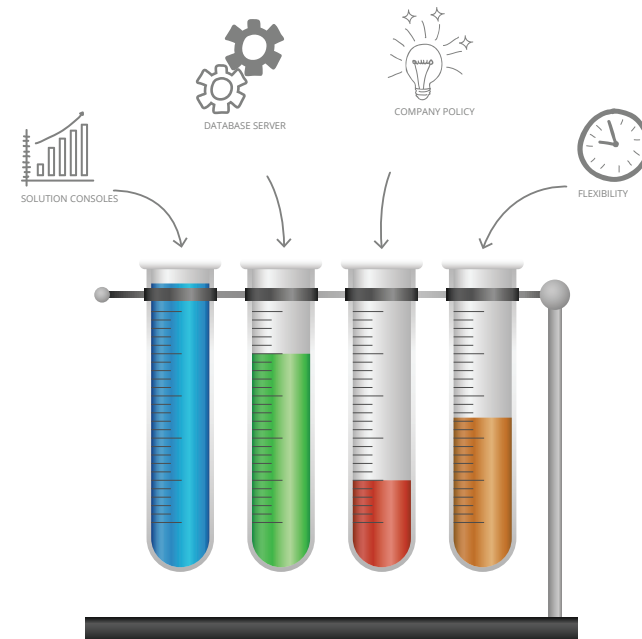
DATABASE SERVER

COMPANY POLICY

SOLUTION CONSOLES

FLEXIBILITY

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

Third-Party Requirements

Make sure you check the label of the solution and understand your environment.

Most software solutions have some sort of 3rd party requirement, typically a dependency on some technology or service. Careful inspection of the required 3rd party requirements can help ensure that well established, supportable, and stable resources are introduced into an environment. Third party resources and technologies that are vague with regards to purpose or lack history should be carefully scrutinized.

Microsoft provides nearly all of the core technologies and interfaces needed to execute a migration (and has even attempted to provide some base tools). There is little need for additional, non-core, technologies for a migration to be successful. Additional features that are really non-essential, can add to the migration complexity and ultimately lead to delays or increased costs.

★ ★ ★

· EXCLUSIVE ·

PREMIUM QUALITY

- GUARANTEED -

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

3

Intrusion

Your environment is complex enough already, don't make it more diffcult.

How intrusive is a proposed solution? Some migration solutions can be very intrusive into an environment. The intrusive nature in some cases may not be readily apparent in testing and lab work, and considerable thought should be given as to a solution's intrusion into a production environment.

Ultimately a solution will be required to work in a production environment and if the solution requires many changes in order to work, the impact of those changes must be evaluated. Furthermore, the more intrusive a solution, the more difficult it is to support due to the fact that it can be extremely difficult to determine root causes when issues arise.

Often some changes that are made cannot be undone in an environment. A vendor with such a requirement is not likely to claim any kind of support for a back-out plans or support for the system(s)

affected. "Vendor Fights" often ensue as each vendor (the core system vendor and the ISV) makes claims as to who owns the issue. This leaves you in the middle, stuck there until some resolution comes forth.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

4

Change Control Process(es)

Simplifying your deployment is a strategy that helps contain potential delays.

Nearly every company has some sort of change control process, be it verbal approval of a manager or a formal prescribed workflow. If a solution requires many changes in an environment, deployment can suffer greatly as approvals are waited on. In testing and lab work, these considerations are often non-existent as the lab is self-managed by its implementers.

When the shift to production is made (typically after product/ solution selection is made and purchased) the change control delays appear and impede upon published timelines. The more simple a deployment is, the fewer potential delays there will be due to change control approvals.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.
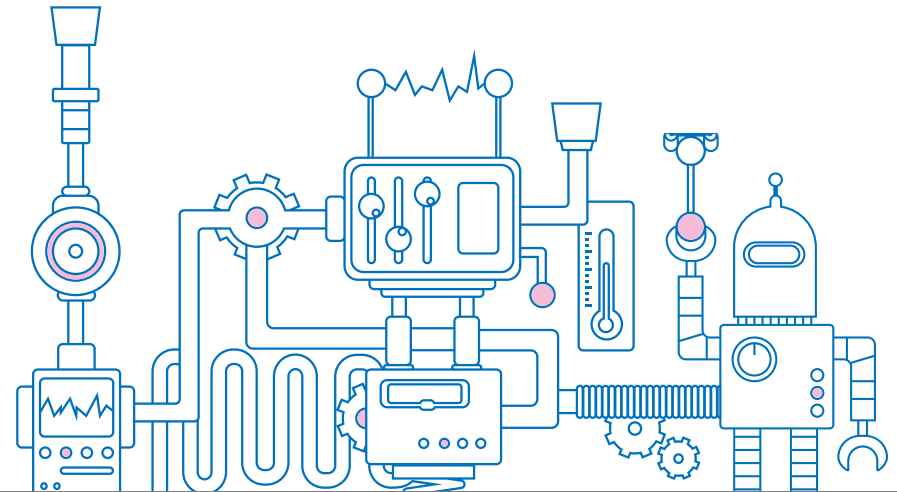
Learn more at priasoft.com

5

Complexity

Adding additional complexity to your project can make it longer and more costly.

Microsoft Exchange is a complex system; there is likely no argument to that statement. However, a migration solution does not have to inherently be complex. Consider the aspects of what is really entailed in a migration: Mailbox Data, Directory Data, User Accounts, Distribution Lists, and Public Folders.   Not all of these items are necessarily of critical importance in all scenarios, but are the core of the Microsoft Exchange system.

A good solution should be one that addresses each of these components and provides specific solutions to each. As is often said, the shortest distance between 2 points is a straight line. In an attempt to confuse and 'create' complexity, some solutions will claim that Microsoft Exchange and Active Directory should (or have to) be migrated together. Where does this requirement come from? Why the complexity? It's most likely a matter of initial design choices by the vendor.

It could probably be said that complex solutions command more money and create a certain emotional attraction as it is human nature to consider complexity as a sign of prowess. However, such complexity, purely by existence does not necessarily provide a better solution and can actually create additional burdens for the implementer.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

6

Transparency

Vendor claims of "transparency" with solutions should carefully investigated.

What value can be given to a transparent change to an environment? Consider your own mailbox. What if you left on a Friday and returned Monday to a mailbox that 'felt' like something was missing. Maybe it is not readily apparent, but is constantly distracting you. Would you spend time trying to figure it out? Probably. How much time? A few minutes? Maybe an hour's worth in a day? What if the change caused you to have missing emails?

These are all real results of migrations where the solution created a less than transparent change to the system. If an organization were of 10,000 people, that could be 10,000 hours of lost productivity. Imagine if that time was life-or-death critical time? What organization could afford that? Transparency may be the most valuable aspect of a migration that you can quantify. Be sure to require first hand experience to a vendor's claim of transparency.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

7

Reversal

When choosing a solution, look for a "reset" button if anything goes wrong.

Lastly, full consideration should be given to how to reverse the deployment of a solution. If a solution has introduced many complex and intrusive technologies or changes, it may NOT be possible to reverse a deployment.

Reversal of a deployment is not the simple un-installation of a product or the removal of a system but is the resetting of an environment to a position that mirrors the behavior and configuration of the environment before the solution was introduced. In testing and pilot scenarios, hardly any concern is placed on this truly critical aspect. The migration of mailboxes is not a constant, recurring set of tasks. Even in the largest of environments, a migration will end and a new set of tasks will appear that deal with the removal of the solution. If the environment is quite large, it could be considerable time before these tasks are encountered and could even be ultimately handed over to a different group that has no inclination as to the changes that

were initially made.

The final consideration with regards to removal is with its influence and effect upon the tear down of the legacy system. If a solution is introduces complex changes, it may be found that proper tear down of the legacy system becomes difficult or even impossible. This is especially concerning if there was original intent to recycle hardware from the legacy system.

USABILITY

Usage of any solution requires professional training, experience and support.

1

Training

Ideal training will go beyond facets of deployment but also critical interactions in your enviroment.

All solutions require training. No one, sometimes not even the developer, knows all facets of a solution. When considering a solution for selection, evaluate how much and what kind of training will be provided. Be wary of, required services that only focus on product deployment or execution...training of this sort does not prepare you for less-than-ideal situations. Knowledge of a product or service without broad knowledge of the fine interactions of the production environment does not help troubleshoot issues at 2am.

Although there are many parts involved in a migration, careful education about how those parts interact and how a solution interacts with those parts can prove invaluable.
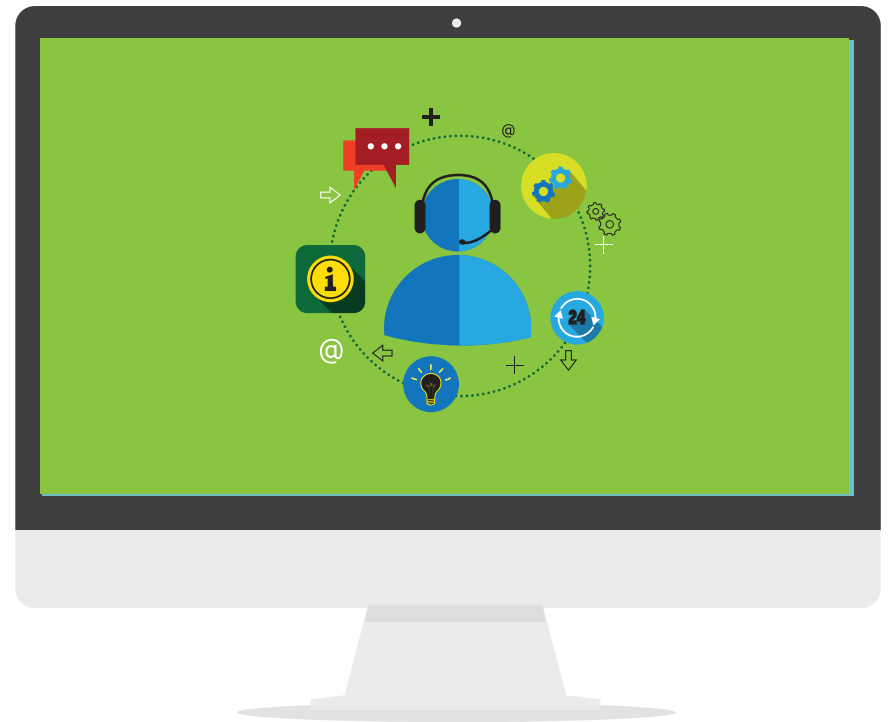

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

Experience

Knowledge and application expertise is a valuable asset and ensures project success.

Once some level of training has been received, experience needs to be gained to expose the 'ins-and-outs' of a product/solution. Time spent working with the different aspects of a solution will ensure that the sufficient experience is gained. Be cautious of solutions that feel 'rushed'. Spend time to become comfortable with how and why a product/solution works (or doesn't).

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

3

Support

Support for a solution is necessary in almost all situations.

All solutions will require support. The level and type of support can save many hours of frustration. Complex solutions obviously require more support. Ask for support up front; it's better to already have it than to wait for issues to arise and then need it. Support can often include customization if needed, be sure to ask about such and to find out what level of customization is available.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.
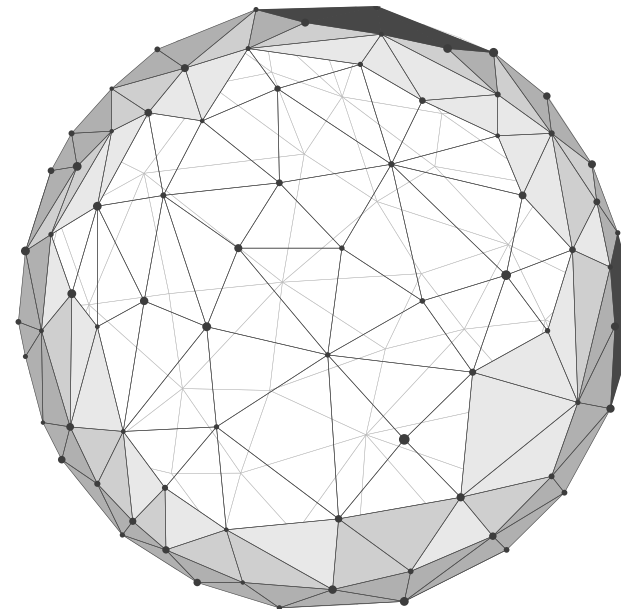
Learn more at priasoft.com

4

Features

Many solutions can "feel" feature rich but make sure that it works for the end user.

Features, features, and more features! Products and solutions that are valuable are so because of features. A product or solution that lacks features, no matter how well it performs, will not feel very valuable.

Features can certainly be overloaded as well, making a product unexpectedly complex. Well-developed solutions will cater to the user/group that must interact with it. Strive to find products that are inherently intuitive. Nobody likes to read documentation, and as such products that are built to guide you are typically made to keep you from making painful mistakes. Wizard driven formats work best as they validate and guide you down a path to execution. Often much effort is placed in the design of the product so that it can be used easily. The ease of use belies the fact that there is tremendous work being done underneath to provide a safe and reliable experience. The list of features is typically the result of the vendor attempting to

cover as many situations as possible. If a vendor is lazy or forceful, the result may be in the user having to work for the product, which in turn equates to extra hours of work. Also in this case, features available may only viable in specific situations (often which may not be your situation), which will can often translate into support costs with the vendor and/or additional training

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.
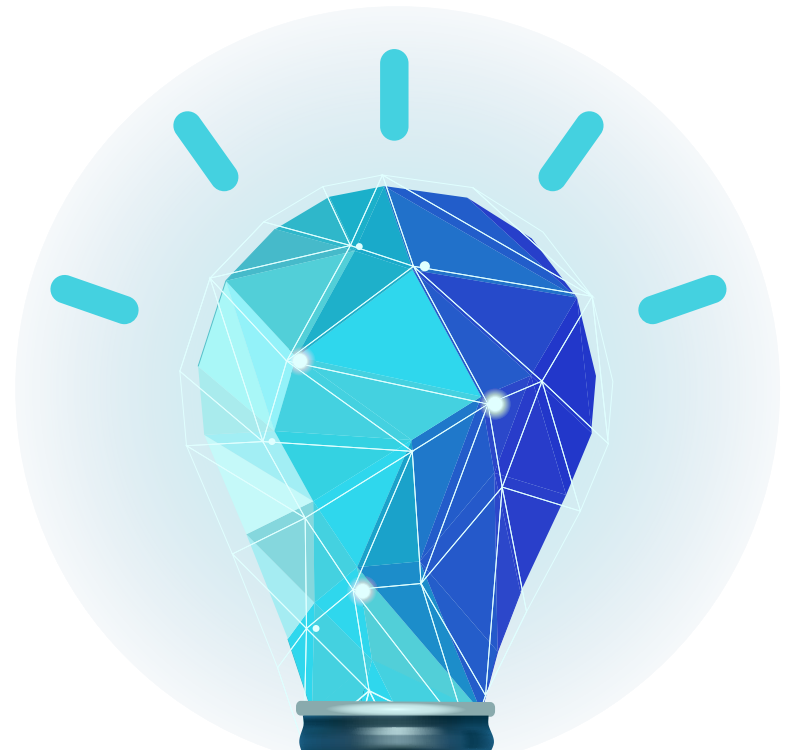
Learn more at priasoft.com

5

Flexibility

You don't want to get deep into a migration only to start finding issues.

The flexibility of a product or solution relates to its ability to handle different situations. As the size of an environment increases, so does the need to have a more flexible product. This is due to the fact that a larger environment is more likely to have additional systems at play that must be taken into consideration.

A solution that takes this into account will rarely force you to use a specific technology or product and will afford you the ability to leverage what you already know in your environment. This will save on training time and costs and will ensure that the systems that are in use today will still be useable in the future.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

6

Purpose

Narrow down your selection to a solution that solves your main challenge.

A solution's purpose should be readily apparent. Products and solutions that are vague or attempt to cover too many topics at once can be very cumbersome to use and to train other IT people to use. This leads to increased costs and time. Furthermore, be wary of unnecessary purposes. For instance, if your main task is migration of mailbox data, what purpose is there for a product that also provides database server management?

When product and solution selection is tied closely to its purpose you'll find better control and lessen the likelihood of 'time slips' (where milestones and migration windows are missed).

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

IMPACT

Who and what is affected during a migration? Why it is important and how can you know?

Internal Users

Every migration will have some impact to the user base, some more important than others.

Internal users are often given the brunt of any environmental change. With email it becomes very personal and even emotional. The impact to this group can set the tone for any future change. If an email migration is poorly executed, this group will be very active and vocal about any future changes that may be forthcoming. This means constantly increasing internal support costs as the internal users start driving up internal Help Desk activity, sometimes unnecessarily and often out of fear.

The best solutions are those that execute changes transparently to the internal users. A complete 'role-play' during testing should be performed to flush out any detectable changes by this group, and if necessary to prepare to notify them before the change occurs.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

2

External Users

External users, such as customers, are usually not thought about during a migration.

Similar to the Internal Users group, this group may be less vocal but conversely could be most critical as it most likely includes parties that affect a company's revenue. If external users feel the effects of a migration, they may choose to go elsewhere.

Choosing a solution that considers this group is key. The vendor that is concerned about this group will typically have very good training available as well as excellent services and support to make sure that this group is not affected.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

3

Administrators

A tool or solution is only as good as the willingness to use it.

Administrators are the group that is typically required to use the selected solution, required to manage it, and report on its progress. Choosing a solution that does not cater to this group can create overstressed admins, which can lead to increases in mistakes and even to unnecessary turnover of these key resources.

Administrators are the glue to any solution. They figure out the details of how to make a solution work (or not work), and if given the right tools, will execute superbly. However, tools that are cumbersome, complicated, and hard to manage will certainly drive up resistance to necessary changes in an environment and can in and of itself cause delays and missed deadlines.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.
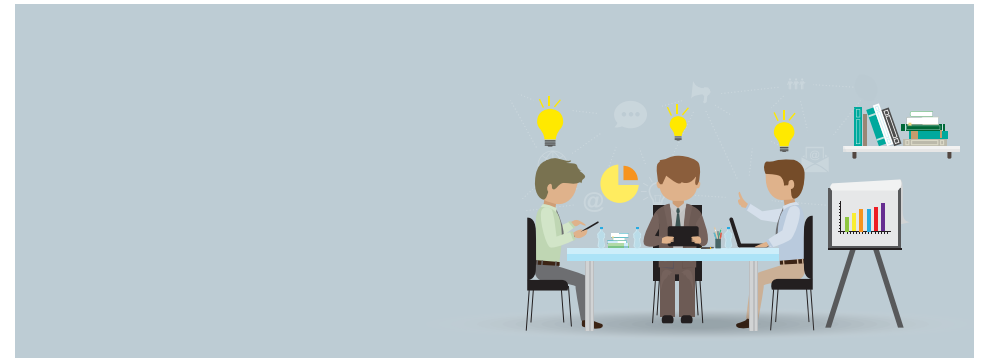
Learn more at priasoft.com

4

Executives and Management

Email dowtime or interuption can have serious financial and decision making implications.

Executives and Management team members rely heavily on the email system. Ultimately this group includes the decision makers for many aspects of the business, including product selection for tools and solutions that keep a company's margins at an expected level. Even a slight interference with this group can create undue turmoil.

Special consideration should be given to this group when selecting a solution, and if a vendor offers specific knowledge of this group, consider that a plus.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.

Learn more at priasoft.com

Business

The reality is that a loss of email for any period of time equals disrupted communications.

Business impact: Not to be understated is the impact of a migration to the business. If email is not flowing, there will be many people, from all levels, issuing complaints. Careful selection of migration tools and solutions will ensure minimal impact to a business. Even if a solution is offered for 'free', consider the potential costs of a free product if the business is made to look unresponsive to its market. At the opposite end of 'free' is the 'does everything' approach. It's really hard to be an expert at anything if you do everything. There are experts out there for many things. Choose them and they will save you time and money.

Look for vendors that speak of how their solution mitigates the impact to a business. If a vendor mentions it, it's most likely because they have put special effort in their designs to deal with the business impact. For instance, what level of rollback capability and dry-run testing do they provide and have them prove it to you.

Aspects of the business that can be impacted by migration and the solution used vary, but still have some common areas regardless: Mail Flow (both in and out of the business), Scheduling, Support, and Sales to name a few. In this day and age nearly all businesses rely on email as its primary means of communication, both internally and externally. Choose wisely with regards to a migration solution.

Priasoft Migration Suite for Exchange™ 6.5 is the leading Microsoft Exchange migration solution that provides class leading flexibility, ease of use and performance.
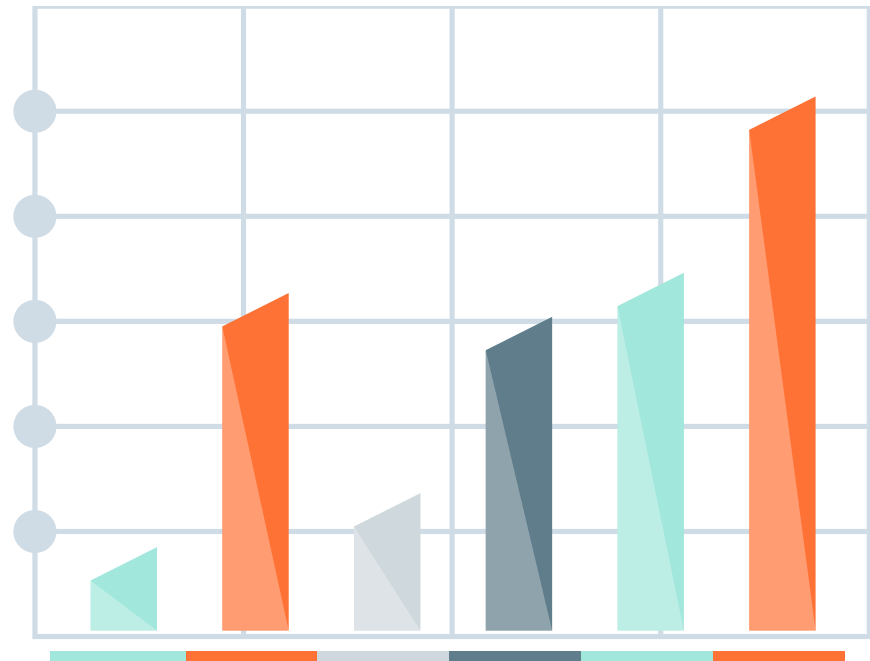
Learn more at priasoft.com

6

Finances

Beware of hidden costs that can see your project go significantly over budget.

The impact of a migration to the financial situation of a company is of a certainty. There are many levels of costs with a migration and each should be discussed and matched appropriately with a solution. It can be too easy sometimes to only focus on the costs that a vendor describes while hiding the hidden costs they know will almost certaintly occur.

The biggest hidden costs to be cognizant of are with internal support. Vendors will typically support only their product and what it claims to do. Outside of that you may be on your own. Some vendors are able to provide better support services when their product is less complex and more task-specific. Their support services will act more like a group of experts at your disposal. The internal support costs can skyrocket if end users are unaware or feel that things are not working the same way as before. Even waiting for data that prior to migration was immediately available can drive up internal support.

Conclusion

Who will be using the solution you select? Can those people be easily trained to use it? Often with a migration, the initial people used to select the product or solution are not the same people that will actually run the project. If a product requires deep knowledge and training, the same information will have somehow be conveyed to the project team. This is one area where hidden costs can occur especially if the product requires "product certification" before use as it is probably overly complicated. Choose a solution where "simple" often works the best, not just in at excecution but also for outwards delegation to ensure project success.

PRIASOFT™

About Priasoft

As a trusted Microsoft Partner, we bring the expertise, software, and support to help you successfully transition your infrastructure safely, securely, and with reduced risk.

Corporate Headquarters
60 E. Rio Salado Parkway | 9th Floor | Tempe, AZ 85281
TEL: 1.480.656.7402
FAX: 1.480.366.5801
EMAIL: sales@priasoft.com

www.priasoft.com