

# TOP 10

## TOP 10 STEPS TO ENSURE A SUCCESSFUL MIGRATION TO EXCHANGE 2013



**Microsoft Exchange has become the lifeblood for many businesses.** It provides the fundamental platform for how people inside and outside of the organization communicate and collaborate. Without Exchange to provide the equivalent of 21st century dial tone, many critical business activities would simply cease to operate.

Migrating to a new Exchange environment, therefore, is probably one of the most important activities many IT organizations will face. An unsuccessful migration is not an option: The organization must have a clear plan and path for success, and the IT organization must ensure that plan is well devised, well communicated and well executed. It must preserve the user experience, provide bulletproof coexistence during the migration and assure full compliance and business continuity.

There are many reasons for enterprises to commit early to an Exchange migration or consolidation project. Microsoft has made some nice changes to Exchange 2013, including a brand new look and interface as well as advanced features, such as Smart Search, that will boost collaboration and productivity. Data loss prevention features will help IT meet compliance requirements across the enterprise, and Exchange 2013 offers advanced integration with other key Microsoft collaboration and communication solutions, such as SharePoint 2013 and Lync 2013. In addition, Exchange 2013 offers a range of tools that support the burgeoning bring-your-own-device (BYOD) trend. With these additional features, migrating to Exchange will save your organization money over the long run by improving the user experience and enabling significant productivity gains.

Whether upgrading a legacy environment, migrating from a non-Microsoft platform or undertaking a consolidation project due to a merger or an acquisition, the question for many organizations is not whether to migrate to Exchange 2013, but how to begin and what steps to take to ensure a smooth, successful and cost-efficient migration. Here are the top 10 ways to ensure a successful migration to Exchange 2013:

## **Step #1. Define your environment.**

The first question you must answer is this: Where are you migrating from? There are many issues surrounding how earlier platforms, such as Exchange 2007 and Exchange 2010, will coexist with Exchange 2013. For organizations that still have Exchange 2003, the issues may be even murkier still – without the right tools in place, there might be a need to do two migrations.<sup>1</sup> This might also be the right time to consider migrating to Exchange from other platforms, such as Notes, GroupWise or Google. Defining your existing environment will help you decide whether you should migrate to Exchange 2013 and what tools you will require to make the migration successful.

## **Step #2. Do a full assessment.**

Extensive pre-migration planning is essential. You need to understand your organization and how it works, knowing what should be moved and when, so that you can ensure the migration will have zero impact on operations. A detailed assessment will look at your technology in conjunction with your business objectives so that the resulting architecture will satisfy your business needs, which is particularly important in today's environment, where IT is being pressured to deliver increased agility. This could be a costly and time-consuming process that can be simplified dramatically with the right tools to help you gather accurate and current information from across your not-always-homogeneous messaging environment.

## **Step #3. Prepare – everyone and everything.**

Before you actually begin the migration, make sure that you are prepared – and that everyone in the organization is prepared. Proper preparation means that you have a recovery solution in place, have done an inventory of all source objects, have reviewed all historical data for trending and forecasting, and have put in place a plan for Active Directory cleanup. Another essential part of a successful migration is effective communication across the organization. Because everyone in the organization depends upon the email and collaboration systems, it is important that you have a plan in place for communicating when migrations will take place and what users should expect. You don't want any surprises – and neither do your users.

## **Step #4. Build an asset management plan.**

An asset management plan should be an integral part of your migration assessment. You need to discover and identify hardware and software details and make sure you have the right tools in place to track and manage your Client Access License fees, which is critical in an Exchange Server environment.

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<sup>1</sup> You Can't Migrate to Exchange 2013, InfoWorld, Nov. 20, 2012

## **Step #5. Manage for compliance.**

A successful compliance plan goes hand-in-hand with an asset management plan. As part of managing all of your hardware and software assets with a single set of tools, you want to ensure that your asset management solution provides for the ability to manage purchase contracts and licensing agreements. During a migration, it will be important to reconcile all licensing agreements with your hardware assets. You will also want to make sure you have the tools in place to manage compliance on an ongoing basis, so compliance enforcement is an important consideration.

## **Step #6. Make sure you have a recovery solution.**

With an email and collaboration program such as Exchange 2013, e-discovery compliance is another major consideration. You want to deploy tools that ensure you will be able to retain or dispose of email according to policy, with the ability to search for and recover email from all locations, including backups. You also want to make sure that your recovery solution can find the data it needs across silos, whether the data is stored in Exchange, in backup or within some other application, such as Microsoft Office 365. Timely recovery can save your organization significant time and money in any kind of legal discovery situation.

## **Step #7. Focus on Active Directory cleanup.**

Before you install Exchange Server 2013 on any servers in your organization, you must prepare Active Directory and domains. Exchange Server 2013 adds new schema and modifies existing Active Directory schema classes and attributes, so it is important to use a tool that will simplify and automate the management of Active Directory-based identities and accounts. Automated Active Directory management will reduce the time it takes to complete the migration and simplify a number of critical activities, such as workflow management, approvals, security, scanning and pruning.

## **Step #8. Don't forget about identity management.**

Identity management is a critical aspect of your environment, so it is important to make sure that nothing slips through the cracks during the migration. Identity management software will help you migrate all of your critical IT governance processes to Exchange, including the management of user identities, privileges and enterprisewide security.

## **Step #9. Consider the cloud.**

For some organizations, the timing may be right to shift to Exchange Online in an effort to reduce costs and simplify manageability. If you are considering this type of migration, it is important to note that all of the challenges you would be facing in a traditional migration must still be addressed in a cloud migration. You need the same focus on planning, preparation and coexistence, and you need the right set of tools to manage all of your key functions, such as asset management, compliance, security, recovery, Active Directory cleanup and identity management.

## **Step #10. Choose the right partner.**

Because of the importance of Exchange migration – along with the complexity and possibilities of things going terribly wrong – enterprise IT professionals should consider deployment with a trusted partner that has experience in handling all types of migrations. With more than 35 million mailboxes migrated and 40 million mailboxes managed, Dell offers a full suite of solutions for Exchange 2013 to ensure that customers have everything they need to prepare for and implement their migration, enable coexistence, ensure compliance and manage the environment. With ZeroIMPACT Migration Solutions from Dell Software, customers can take advantage of a proven methodology that incorporates four pillars: prepare, migrate, coexist and manage. With this approach, organizations are able to mitigate the risks of a migration, maximize new platform investment value, ensure compliance, save money and maintain end-user productivity.

In an era in which there is a lot of hype around new technologies – virtualization, big data, social media and others – the most important projects are sometimes those that have the biggest impact on day-to-day operations. If your organization is planning a migration to Exchange 2013, there will be few IT projects more important. Make sure it is a success. And make sure you understand how Dell can help you ensure that success across your enterprise. For more information on Dell's ZeroIMPACT Migration Solutions, please visit [www.Quest.com/ZeroIMPACTMigration](http://www.Quest.com/ZeroIMPACTMigration).