Planning an Email Migration

Whatever your reason for migrating your email archive, ensure your data is transferred successfully by following the steps in our planning guide.

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Planning an Email Archive Migration

Email archiving is best practice in many industries. If you're working in a heavily regulated sector like financial services, healthcare, energy, life sciences, education or government, it is essential.

Whether you're migrating your email archives to consolidate, centralize or provide greater security for your data, it's important to plan properly to ensure the transfer is thorough and secure. Otherwise, you risk data loss, failure to comply with regulatory requirements and issues for end-users.

In this guide, we cover the fundamentals of migrating your email archive - what this entails, why it's important and how to ensure you're prepared.

"By 2027, the number of emails sent and received worldwide each day is expected to reach 408.2 billion"

The Radical Group

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What is Email Archiving?

Put simply, archiving emails means storing them safely in a central location. An email archive securely and compliantly stores all the data and attachments from sent and received emails, so that they can be searched for and retrieved whenever they're needed.

Before email archiving, emails were normally just stored in individual inboxes, with organisations often backing up data for disaster recovery. Anyone who has searched for an important email in their inbox knows how inefficient this is, with email chains, attachments and data being difficult to source. From an organisational perspective, it also may not be sufficiently secure

Email archiving solves these issues - allowing businesses to quickly find emails and ensure that the data is securely stored.

Why is Email Archiving Important

Email archiving is important for a number of reasons, including:

Store Management

It reduces the amount stored on mail servers. As the number of emails is constantly growing and email data is increasing in size, transferring the data to an archive reduces the pressure placed on the mail server. Emails can also be replaced by a stub or shortcut to the original message, reducing the amount of data without impacting email retrieval.

Data Retention & Compliance

When properly archived, emails are stored in a separate location that protects companies from data loss and reduces the impact of data corruption - ensuring they stay compliant with legal and regulatory requirements.

Disaster Recovery

Separating email storage from the mail server means that data can be recovered in the event of a disaster. Downtime is minimised, with email data remaining fully available to users.

eDiscovery

Archiving simplifies Electronic Discovery (eDiscovery) - the process of searching, identifying, collecting and reviewing electronically stored data. It's normally part of a legal request, so it's important to stay compliant at all times.

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What is an Email Archive Migration?

An email archive migration is the transfer of email data from one location to another, from one archiving platform or file format to another. There are numerous different variations, but no other email archive migration solution supports data migrations and shortcut management for as many archive versions and platforms as Transvault.
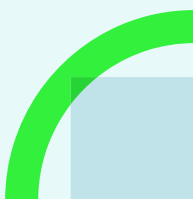
Archive Vs. Mailbox Migration

Although they both refer to the transfer of email data, archive and mailbox migrations are different things.

Archive Migrations

Involve moving email data that has been stored on an archiving platform. This covers archived journal and end-user mailbox archive data.

Mailbox Migrations

Involve moving live email data on a mail server like Microsoft Exchange. For example, transferring a mailbox from Exchange 2016 to Microsoft 365.

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Why Would You Migrate Your Archive?

As organizations evolve and compliance regulations change, adopting new email platforms becomes necessary. Correct migration is crucial to avoid legal, compliance, and productivity risks.

Key reasons for migration include:

◆ End of life

This occurs when an email archive becomes obsolete At the end of its lifespan, software will no longer be developed or supported. This leads to security risks, as there will be no bug fixes, compatibility issues and no technical support. When this occurs, it's time to migrate your archive..

◆ Cost

On-premises email archive storage is often more expensive than cloud storage due to hardware costs, maintenance, scalability challenges, data extraction expenses, and hardware depreciation.

◆ Compliance

eDiscovery is essential for litigation readiness. Legacy archives often lack security and auditing capabilities, increasing legal, financial, and reputational risks in highly regulated industries.

◆ Digital Transformation

Cloud-based archiving enhances cost savings, security, and compliance. As part of digital transformation, archive migration is essential.

◆ Data Consolidation

As storage ages, organizations upgrade to advanced solutions. Consolidation reduces managed devices, streamlines archives for compatibility, and improves eDiscovery, costs, and productivity.

◆ Mergers and acquisitions

When a merger or acquisition occurs, there will be multiple archives that will need to work together. Consolidating migrates the archives, ensuring eDiscovery works across the merged companies.

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Considerations for Migrations

Migration is an important process. You should ensure that you go into it with a thorough understanding and an idea of challenges and future considerations.

On-prem vs Cloud: Some organisations can be daunted at the prospect of moving their archives from on-site to the Cloud. But migrating to the Cloud delivers numerous major benefits, including significant cost savings, technical and operational benefits and improved risk management.

Which Cloud platform? You need to decide which Cloud platform to migrate to. This includes platforms like Microsoft Office 365, ProofPoint and Mimecast.

Who should do the migration? Due to concerns about the cost of migration or a desire to retain complete control over the process, it can be tempting to do the migration in-house. If you have the correct expertise and a full understanding of the process, a DIY migration can be a viable option. However, due to its complexity and the risks of getting a migration wrong, using a specialist like Transvault is the safest option.

What data? When you undergo an email migration, you have an opportunity to audit the data that you want/need to retain. At Transvault, we also give you more transparency over the data as it moves - we keep you updated as to which data is moving during the process.

Challenges: What limitations are there on ingestion capabilities? Do you have sufficient bandwidth? Is there potential for data loss?

Compatibility: What format is the existing data stored in? Can it be converted?

Compliance: As we've discussed earlier, eDiscovery is vital for compliance. Will this be retained after the migration?

End users: How will the migration affect the end user? Will they be able to access the archive during migration? Will they be able to access and navigate easily once complete? What implications does this have on productivity? What training will be needed?

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Preparing for an Email Archive Migration

Being properly prepared is key to a successful migration. It's a complicated process, so to make it as straightforward as possible, we've broken the process down into stages so you know what to expect before, during and after the migration.

Pre-Migration Actions

There are lots of things that can go wrong when migrating and a lot of considerations you need to take into account.

Project objectives – what do you want to achieve? You should clearly outline the goals and objectives of the migration.

Scope – what are you migrating? Identify the data that is to be moved. Which method will you be using? A staged, hybrid or complete migration?

Stakeholder Identification – Communicate with all stakeholders involved in the migration.

Risk assessment – what's the potential for something going wrong? How would that affect your organisation? It's important to conduct a risk assessment at the outset and plan for any challenges.

Budget and resources – how much will the migration cost, and what other resources will it involve? Allocate the budget and resources necessary.

Timeline – how long will the process take? Does this have the potential to interfere with any other business objectives? Develop a detailed project timeline with key milestones and deadlines.

"Proper preparation for an email migration is critical to safeguard your data, ensure business continuity, and avoid disruptions to communication. Without careful planning, you risk data loss, prolonged downtime, and compliance issues that could impact your organization's productivity and reputation. A thorough approach ensures a smooth transition, preserving email integrity and keeping your teams connected seamlessly."

Name of Team Member
Email Migration Specialist

Migration Plan Development

After you've gone through the initial considerations, start developing your migration plan.

Migration strategy – develop a detailed migration strategy based on the type of migration you're planning. For example, will you go for a phased approach where you migrate emails in stages? Or an archive-first approach.

Communication plan – ensure all stakeholders are kept up-to-date with any changes or effects that may impact them with a communication plan. Agree on who needs to be included and make a note of key deadlines and dates that stakeholders need to be aware of.

Infrastructure Preparation

Before the migration, you need to ensure that the infrastructure is suitably prepared.

Migration environment setup – set up and configure the migration environment, using prerequisites defined in the statement of work (SOW). This can include things like the migration plan, strategies, process, backup/rollback and communications plan.

Security configurations – make sure you implement your recommended security measures to ensure data isn't compromised during the migration. This includes things like firewalls, access controls and vendor remote access.

Migration Validation

Before proceeding with a full-scale migration, it's essential to validate your approach to minimize risks and ensure a smooth transition.

Proof of Concept – planning is one thing, proving the concept is another. By performing a pilot migration, you can make any necessary adjustments before the full migration and ensure full buy-in from all stakeholders.

A pilot migration involves a small-scale implementation that can identify any flaws before the full rollout.

After following these steps, you should be ready to implement the migration.

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Migration Tips and Best Practices

With so much to consider, we've collected some email archive migration tips and best practices to help things run as smoothly as possible.

◆ Choose Data Carefully

Migrating an email archive can be a good opportunity to audit your data. However, if you're currently suffering from poor eDiscovery and the new platform has much better functionality, it may be better to assess data after the migration.

◆ Ensure the migration doesn't affect your legal and regulatory requirements

Highly regulated industries need to ensure that the archive complies with legal and regulatory requirements after the migration. Will emails retain their original format? If they need to be converted, will this affect their data? What happens to orphaned or corrupted files? You need to consider possibilities like this that may affect your compliance, or, choose a migration specialist who can ensure this for you.

◆ Get Employees on the right page

With a new archive, you'll have new processes. Ensure employees are fully clued into how these work and have received any necessary training.

◆ Choose a trusted migration partner

As we've discussed, your email archive migration is extremely important and there are real consequences for getting it wrong. That's why you need to ensure that you have full confidence in who you trust to do your migration. You may have the resources in-house, otherwise, choose a partner like Transvault. We use world-class technology with unbeatable expertise, experience and integrity to ensure your migration runs seamlessly.

Why
Transvault?

Transvault is the migration partner that businesses trust. No other email archive migration solution supports data migrations and shortcut management for as many archive versions and platforms as Transvault.

We've successfully delivered thousands of migrations across numerous industries. We combine the latest technology, techniques and algorithms with decades of combined experience to ensure your migration runs seamlessly from a business, compliance and end-user perspective.

- **World-class products and services**
- **A suite of solutions to power success**
- **The best people behind the best technology**
- **100% focused on the outcome you need**

WORK WITH THE MIGRATION EXPERTS:
Get in touch to find out how we can help with your email archive migration project.

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