

# TOP 10 Factors to Consider when Moving Email to a Cloud Platform



Migrating an application as essential as email over to a cloud platform such as Office 365 is a complex project and requires experience. There are a host of issues to work through and very little room for error. Outside of the complexity of the massive amount of data that will need to be sorted with trust, the project must have lift off with a defensible handle on the security, compliance, and the overall cost implications of migration.

The pre-migration strategy is as critical as the post-migration experience, and this is where MSPs can prove to be the go-to trusted advisor to their clients by helping them identify the proper considerations, services, and migration solutions that will get their data sorted securely, seamlessly and in compliance with regulations in the fastest possible manner. This is when an MSP can become the Migration Master a business can depend on.

1

**Assess Hosted Email Benefits:** Managing, maintaining, and securing email servers on-premise is expensive and resource-intensive, so you should advise clients to migrate all their data, inclusive of legacy archives to a robust and all-inclusive compliant cloud platform such as Hosted Exchange or Office 365. This will allow them to permanently reduce their hardware software footprint and eliminate the costs in maintaining them. Clients will now be able to decommission all in-house email-associated software and hardware, unburdening their staff from administrative and security tasks, while eliminating the costs of running the system in-house.

2

**Automate the Migration:** While the benefits of Hosted Exchange are clear, a migration can go awry without proper planning and execution. For best results, businesses should consider leveraging a proven, trusted migration service with "drag and drop" commands for tasks like deciding what archives to move, applying selection criteria, and syncing folders with their owners, and full chain-of-custody. This makes the process simple, relatively painless, and trusted from the start.

3

**Set a Migration Path:** The completion of key preliminary steps is crucial to a seamless migration for end users. Such steps include cleaning up existing mailbox shortcuts to prevent confusion, setting a path for archived email to the correct folders after the transition, and creating rules to migrate only the needed information. Paying attention to such details can save time and money.

4

**Ensure a Safe Transition:** Email archives often contain sensitive information and proprietary business data, so clients need assurances of a reliable, safe transition to the hosted platform. Verify that the migration tool you use can maintain data security during the move, ensure a complete transition of shared data, archives and understands the complexity that is PST files. It's not enough to just say you can migrate PSTs, you have to be able to migrate their entire legacy email, while managing the chain-of-custody so the right users get access to their files post-migration.

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**Understand the Costs:** In weighing migration options, businesses must consider the costs. Installing migration servers on-site potentially introduces costs and causes delays, but you can steer clients in a different direction by telling them about their options. When migrating to Office 365, for instance, it makes sense to leverage a migration tool that works with the Microsoft Azure Cloud platform to drive the process. This way, no migration servers are needed because you are migrating to the cloud, from the cloud.

6

**Execute a Speedy Transition:** For some businesses, the very thought of how long a migration can take is enough to discourage a move to the cloud – and they tend to stick with aging, hard-to-maintain systems. To prevent such a scenario, choose an efficient migration solution that leverages virtualization and reliable high-speed connectors to move the data. This accelerates the process and lessens the chance of disruption.

7

**Plan an Archive Transfer:** To achieve compliance with certain data privacy laws, businesses must archive all emails for a number of years. That means an archiving solution should be in place to store all email-related data in a platform-neutral format. This makes migrating archived email data to the cloud a much more straightforward endeavor that minimizes the risk of non-compliance.

8

**Audit All Data and Files:** For regulatory compliance and data-control reasons, businesses must keep track of all email data, down to every attachment, the size and content of each email, and PST files. Auditing the information on an ongoing basis is a good practice, and the same is true when preparing a cloud migration. Make sure all relevant data is audited to meet compliance requirements and preserve chain of custody.

9

**Maintain Compliance:** Office 365 gives businesses access to an archiving solution to help meet regulatory compliance and locate individual emails, should that ever be necessary. When migrating your clients' on-prem email, check that the hosted platform is secure and complies with all relevant regulatory requirements, be it HIPAA for healthcare records, FERPA for student records, or Sarbanes-Oxley for financial reporting.

10

**Prioritize Multiplatform Support:** The migration tool you leverage should support as many cloud platforms as possible to avoid compatibility issues. A migration to Office 365, for instance, should include support not only for Microsoft platforms but also ancillary solutions that handle functions such as security and data backup and recovery.

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