Building an Effective Email Migration
Communication Plan
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Building an Effective Email Migration Communication Plan

When planning to migrate your organization’s email from Novell GroupWise to Microsoft Exchange, clear and convenient communication is critical to the success of your migration project. You need to communicate with the people being migrated, their managers, the migration Support team, the migration project team, and your organization’s management. *Building an Effective Email Migration Communication Plan* provides important recommendations from Netmail on how to build an effective email migration communication plan.

**Identify Your Key Stakeholders and their Communication Objective**

<table>
<thead>
<tr>
<th>Key Stakeholder</th>
<th>Communication Objective</th>
</tr>
</thead>
</table>
| Executives (Directors, CIO) | - They know what is happening when and why at a very detailed level  
- They know how and when to get their organizations to support the change  
- They are excited advocates for the change  
- Expectations are set regarding the challenges of the move |
| Company Management (Department Heads, Directors, Managers) | - They know what is happening with the launch and when at a detailed level  
- They understand the impact to their department  
- They know what needs to be done and assigned to get ready  
- They are actively engaged (vested) in making the move successful  
- They are excited about the change |
| Support Personnel (Department Support Resources, Help Desk Personnel) | - They consistently understand what we are doing and when so that the message is the same no matter who you speak to  
- They know where to go for education and training  
- They are excited advocates  
- They are vested in the change |
**Key Stakeholder** | **Communication Objective**
--- | ---
End Users | ▪ They know what will happen and when it takes place  
 ▪ They know the steps that they need to complete for a successful transition  
 ▪ They are educated about the change and know how to get training and support  
 ▪ They are excited for the change and see it in a positive light

---

**Determine How You Will Communicate**

**Email Broadcasts**
- General Email broadcasts to user population  
  - Deliverable: Standard Email Template and monthly messages
- Targeted Email broadcasts to heavy and vocal Email users  
  - Deliverable: Personal Email from a launch team member
- Key Stakeholder Email broadcasts  
  - Deliverable: Status report from director or CIO

**Launch Intranet Site**
- Deliverable: A central location for the latest Outlook migration information (updated weekly)

**Face-to-Face Interaction**
- Deliverable: Weekly phone calls, visits and trainings with departments and areas
- Deliverable: Personal (high-touch) support available on launch date (volunteers to “walk the floors”)
- Deliverable: Pre-launch and launch week information kits
- Deliverable: Posters and table cards

**Events**
- Deliverable: User giveaway to drive behavior (Email account clean-up, etc.)
- Deliverable: Series of training and information seminars
## Decide What Needs To Be Communicated

<table>
<thead>
<tr>
<th>Key Stakeholder</th>
<th>What They Need to Know</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Executives (Directors, CIO)</strong></td>
<td>- Expectations—challenges, benefits</td>
</tr>
<tr>
<td></td>
<td>- Definition of project success</td>
</tr>
<tr>
<td></td>
<td>- Launch status (create a metrics dashboard)</td>
</tr>
<tr>
<td><strong>Company Management</strong></td>
<td>- Expectations—challenges, benefits</td>
</tr>
<tr>
<td>(Department Heads, Directors, Managers)</td>
<td>- Launch status</td>
</tr>
<tr>
<td></td>
<td>- Will my department applications be implicated, and if so, are they ready?</td>
</tr>
<tr>
<td></td>
<td>- What is the impact on my employees’ productivity?</td>
</tr>
<tr>
<td><strong>End Users</strong></td>
<td>- Why are we moving to Outlook?</td>
</tr>
<tr>
<td></td>
<td>- How does this impact me?</td>
</tr>
<tr>
<td></td>
<td>- What benefits can I expect?</td>
</tr>
<tr>
<td></td>
<td>- What are the project dates?</td>
</tr>
<tr>
<td></td>
<td>- How will it happen (rollout details)?</td>
</tr>
<tr>
<td></td>
<td>- What do I have to do?</td>
</tr>
<tr>
<td></td>
<td>- How do I get help?</td>
</tr>
<tr>
<td></td>
<td>- Email policies and practices (saving old email, 120-day limit, size limit)</td>
</tr>
<tr>
<td></td>
<td>- Known issues (version installation issues, other?)</td>
</tr>
<tr>
<td></td>
<td>- GW and Outlook usability differences (What will they miss? Rules, retract messages, What will they get?)</td>
</tr>
<tr>
<td></td>
<td>- How can I get access to resources, conference rooms, distribution lists, etc.</td>
</tr>
</tbody>
</table>
Create Tools to Help Facilitate Communication

The people being migrated need to know what’s going on, what’s expected of them, where to go for help, and where to find additional information. They also need to be able to recognize official communications from the migration team. To accomplish these goals, Netmail recommends that the migration team create an Intranet Site, a Distribution List, and a Migration Alias to facilitate the sharing of information.

- Intranet Site
- Distribution List
- Migration Alias
- Migration Theme

Intranet Site

Netmail recommends that you create an Intranet site that is available to all members of the migration team, the Support managers, and end users. This site should contain the following information:

- Project plan
- Migration processes
- Migration tracking spreadsheet
- Before & After migration procedures
- Known Issues and frequently asked questions (FAQs)
- End-user documentation, downloads, and/or videos
- Support Request form
- Bug filing form

Members of the migration team should have permission to post Known Issue and FAQ articles. Users should be able to comment on each of the procedures and the Known Issues and FAQ articles. The migration team should monitor these comments and update the individual procedures and articles as needed. Users should also be able to file Support Requests and monitor the progress of their previously filed Support Requests from this site. If someone feels that they have identified an issue with the product or the service, they should be able to file a bug report.

Distribution List

The migration team should create a team distribution list. All project email is sent to this distribution list and is available to all members of the project team.

Migration Alias

The migration team should create a migration alias from which all official migration communications are sent. Select people should have the ability to send email from this alias. This helps users identify official migration communications.
Migration Theme
To make the migration process more enjoyable and engaging for end users, the migration team may want to consider creating a theme around the migration project. For example, end users can be invited to embark on a virtual journey (complete with an “itinerary” outlined on postcards). The analogy of animal or insect migrations to warmer climates can also be used.

Establish a Regular Email Communication Timeline
The primary method of communication between the migration team and the rest of the organization should be email. Netmail has created email templates that are included in *Building an Effective Email Migration Communication Plan*. These email messages are intended to be sent on a specific schedule before and after migration.

**Email Communication Timeline**

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Communication Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before Migration</td>
<td>• Pre-Migration Survey</td>
</tr>
<tr>
<td>Three Months Prior</td>
<td>• Manager Email</td>
</tr>
<tr>
<td>Two Months Prior</td>
<td>• General Email</td>
</tr>
<tr>
<td>One Month Prior</td>
<td>• Manager Email • User Email</td>
</tr>
<tr>
<td>One Week Prior</td>
<td>• User Email • General Email • Manager and Support Email</td>
</tr>
<tr>
<td>One Day Prior</td>
<td>• General Email</td>
</tr>
<tr>
<td>After Migration</td>
<td>• Welcome Email • Post-Migration Survey</td>
</tr>
</tbody>
</table>
This section describes the intended use of each of these email messages included in the timeline.

**Before Migration – Pre-Migration Survey**
This email message is sent to users before the migration begins. This message thanks the person who is going to be migrated for their participation during the migration and gives them the opportunity to provide feedback by completing the Pre-Migration Survey. See Appendix A: Migration Surveys

**Three Months Prior – Manager Email**
This email message notifies all managers in your organization that your organization is migrating to Microsoft Exchange. In this email message you should provide an overview of the migration process and tell your managers when the migration is scheduled. You should give the managers the information they need to communicate about the migration to their employees. See Appendix B: Sample Email Communications

**Two Months Prior – General Email**
This email message is sent to everyone who is a candidate for mailbox migration. It notifies them that their mailbox is scheduled to be migrated. This email message provides them with contact information. See Appendix B: Sample Email Communications

**One Month Prior – Manager Email**
This email message is sent to all managers and lists their employees that you plan to migrate. This notifies the managers which of their employees you plan to migrate and provides them with the opportunity to postpone migration for specific individuals if necessary. See Appendix B: Sample Email Communications

**One Month Prior – User Email**
This email message is sent to all people scheduled to be migrated. It is a reminder and contains essentially the same information as the Two Months Prior General Email message. Links to documentation on the intranet site can also be included to allow users to begin familiarizing themselves with the new email client. See Appendix B: Sample Email Communications.

**One Week Prior – User Email**
This email message is sent to all people scheduled to be migrated. It is a reminder and strongly encourages them to complete the Before Migration procedures. See Appendix B: Sample Email Communications and Appendix C: Sample Before and After Migration Tasks.
One Week Prior – General Email
This email message is sent to everyone who has completed the Pre-Migration Survey and has been qualified to migrate. It contains additional information about what to expect when their mailbox is migrated. Users can also be reminded about where to find documentation on the new Outlook client. See Appendix B: Sample Email Communications

One Week Prior – Manager and Support Email
This email message is sent to the managers of the people being migrated, to the people performing the migration, and to the members of the Support team. This is intended as the official migration hand-off. It lists who is scheduled to be migrated, who will perform the migration, and who is scheduled to support the migration. It specifies the migration time and the expected duration. See Appendix B: Sample Email Communications

One Day Prior – General Email
This email message is sent to everyone who has completed the Pre-Migration Survey and is ready to migrate. This is their final notice that their mailboxes will be migrated on the next business day. This email can also include the After Migration procedures that users will have to complete once their account has been migrated. See Appendix B: Sample Email Communications and Appendix C: Sample Before and After Migration Tasks.

After Migration – Welcome Email
This email message is sent to everyone who has been migrated. This email message is used as the final migration verification step. It is sent to the local Microsoft Exchange Server mailbox. The user will see it in their Exchange Server mailbox and they should also see it in their Exchange mailbox. If there is a problem with the mailbox migration, the administrator will receive a non-delivery receipt (NDR). If that happens, the migration administrator can begin troubleshooting procedures. This email message contains the user’s Microsoft user name and their temporary password. This email is also a reminder that users should complete the After Migration procedures and set up their mobile devices. See Appendix B: Sample Email Communications and Appendix C: Sample Before and After Migration Tasks.

After Migration – Post-Migration Survey
When the migration team confirms that the user has been successfully migrated and that any migration issues have been resolved, they send this email message. This message thanks the person who was migrated for their participation and gives them with an opportunity to provide feedback by completing the Post-Migration Survey. See Appendix A: Migration Surveys
Create Educational Email Communication Activities

It is important to educate and involve the entire organization about the upcoming migration. Netmail has created suggested Email Communication Activities that are included in *Building an Effective Email Migration Communication Plan*. These activities are intended to be presented on a specific schedule before and after migration. This section describes the intended audience for each of these suggested Email Communication Activities.

**Email Communication Activities - 3 Months Prior**

<table>
<thead>
<tr>
<th>Audience</th>
<th>Activity</th>
<th>Completed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>• Communication Plan Review</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Support Plan Review</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Project Management staff updates (bi-weekly)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Launch progress updates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Provide executive slide sets</td>
<td></td>
</tr>
<tr>
<td>External Executives</td>
<td>• Department Presentation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Introductory Email &amp; Project Fact Sheet</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Custom “Needs and Impact” statement</td>
<td></td>
</tr>
<tr>
<td>Admin Support</td>
<td>• Specialized training for admin assistants</td>
<td></td>
</tr>
<tr>
<td>Technical Support</td>
<td>• Weekly training</td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>• Knowledge base and FAQ available</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Outlook help desk training</td>
<td></td>
</tr>
<tr>
<td>External (field)</td>
<td>• Continue weekly support contact</td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td>• Monthly progress assessment</td>
<td></td>
</tr>
<tr>
<td>End Users</td>
<td>• General announcement Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Intranet Site goes live</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Weekly end-user challenges</td>
<td></td>
</tr>
</tbody>
</table>
## Email Communication Activities - 2 Months Prior

<table>
<thead>
<tr>
<th>Audience</th>
<th>Activity</th>
<th>Completed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>• Launch progress updates</td>
<td></td>
</tr>
<tr>
<td>External (field) Executives</td>
<td>• Updated “Needs and Impact” statement</td>
<td></td>
</tr>
<tr>
<td>Admin Support</td>
<td>• Continued training for administrators of all managing directors</td>
<td></td>
</tr>
<tr>
<td>Technical Support Personnel</td>
<td>• Department support staff training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Update knowledge base and FAQ</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Help desk training</td>
<td></td>
</tr>
<tr>
<td>External (field) Management</td>
<td>• Weekly support contact</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Monthly progress assessment</td>
<td></td>
</tr>
<tr>
<td>End Users</td>
<td>• Posters created and displayed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New contest to clean-up email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Outlook events (Brown bag, virtual events)</td>
<td></td>
</tr>
</tbody>
</table>
# Email Communication Activities - 1 Month Prior

<table>
<thead>
<tr>
<th>Audience</th>
<th>Activity</th>
<th>Completed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>• Launch progress updates</td>
<td></td>
</tr>
<tr>
<td>External (field)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executives</td>
<td>• Updated “Needs and Impact” statement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Personal Email on rollout status</td>
<td></td>
</tr>
<tr>
<td>Admin Support</td>
<td>• Admin event/training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Continued training for admins of all managing directors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Specialized training for area managers and field RAMs to support area admins</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Migration technical assistance available</td>
<td></td>
</tr>
<tr>
<td>Technical Support</td>
<td>• Department support staff training</td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>• Additional call volume capacity in place for help desk</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Updated help desk phone menu</td>
<td></td>
</tr>
<tr>
<td>External (field)</td>
<td>• Weekly support contact</td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td>• Monthly progress assessment</td>
<td></td>
</tr>
<tr>
<td>End Users</td>
<td>• “How to” Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• “Differences” Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Promote desired support paths</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Information kiosks in company buildings</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Support Kiosks in company buildings (e.g., for setting up mobile devices)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Outlook events (Brown bag, virtual events)</td>
<td></td>
</tr>
</tbody>
</table>
## Email Communication Activities – Post-Migration

<table>
<thead>
<tr>
<th>Audience</th>
<th>Activity</th>
<th>Completed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>• Celebration</td>
<td></td>
</tr>
<tr>
<td>External (field)</td>
<td>• Update on any business issues</td>
<td></td>
</tr>
<tr>
<td>Executives</td>
<td>• Personal thank you Email</td>
<td></td>
</tr>
<tr>
<td>Admin Support</td>
<td>• Feedback (focus group) from admin assistant staff</td>
<td></td>
</tr>
<tr>
<td>Technical Support</td>
<td>• Monitoring and reporting of rollout issues</td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>• Support team celebration</td>
<td></td>
</tr>
<tr>
<td>External (field)</td>
<td>• Department assessment on implementation effectiveness and business impact of migration</td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td>• Thank you Email</td>
<td></td>
</tr>
<tr>
<td>End Users</td>
<td>• Thank you posters created and displayed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contest for productive uses of Outlook</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer satisfaction survey</td>
<td></td>
</tr>
</tbody>
</table>
What to Expect on the Day of the Migration

- Available, trained and local support personnel
- At least 30-days of previous email (GW) in a user’s Outlook Inbox
- A hotline established for reporting and resolving urgent issues
- Process for communicating critical issues to all users
- Self-support site established and promoted
- Support calls routed appropriately and resolved quickly
- Increased call volume capacity for help desk
- VIP treatment to users
- Enlist product champions as additional first line support
- Train and deploy additional employees to support key stakeholders
- Volunteers to “walk the floors”
- General support kits distributed to employees
Appendix A: Migration Surveys

Pre-Migration Survey

Name: ________________________________

Alias: ________________________________

Manager: ________________________________

Department: ________________________________

1. What expectations do you have for the new Exchange system and Outlook?

2. Have you reviewed the Known Issues for migration?

3. Have you reduced your mailbox size to less than xx megabytes (MB)?

4. Are you ready to have your mailbox migrated?

5. Do you have any major concerns about the Exchange migration?
Post-Migration Survey

Name: ____________________________

Alias: ____________________________

Manager: __________________________

Department: _______________________

1. Did you file any Support requests associated with your mailbox migration? If yes, have they been successfully closed?

2. Was the amount of information and support provided to you before and after the migration sufficient for you and/or your team?

3. Did you use any of the support material or services provided by the Migration team? If no, why not? If yes, was it useful to you?

4. Do you consider your mailbox migration to have been successfully completed? If not, what issues have you experienced?

5. Do you have any feedback or recommendations for the Migration team or Support about the overall migration project?
Appendix B: Sample Email Communications

*Building an Effective Email Communication Plan* contains sample email communications to managers and users when you are migrating mailboxes to Microsoft Exchange.

Please edit the recommended email messages to suit your particular situation. Insert your information when you see the following: `<description of information>`.

**Three Months Prior – Manager Email**

Notify all managers that your company/organization is migrating to Microsoft Exchange. Tell your managers when it is going to happen. Provide an overview of the process. Explain why you are migrating. Give your managers tools to promote your company’s decision to make this change. Give them information to communicate to their employees so that their employees know the migration is coming.

**Two Months Prior – General Email**

Title: ACTION REQUIRED: We are migrating your mailbox to Microsoft Exchange! This email is your first notice that your mailbox will be migrated to Microsoft Exchange on `<Date>`. There are many tasks that you must perform before your email can be migrated. There are also several actions you can take before migration to improve your Microsoft Exchange experience.

See ACTION REQUIRED BEFORE MIGRATION `<insert link to before migration instructions on your Intranet site>` to prepare for your migration.

You can also preview what you will need to do after your mailbox has been migrated. See ACTION REQUIRED AFTER MIGRATION `<insert link to after migration instructions on your Intranet site>` to preview this information.

If you have any questions, check the Microsoft Exchange FAQ `<insert link to Microsoft Exchange FAQ>` and the Microsoft Exchange Known Issues `<insert link to Microsoft Exchange Known Issues>`, or contact support `<insert your support contact information>`.

Thank you,

`<Your Migration or Support Contact Alias>"
One Month Prior – Manager Email

Title: ACTION REQUIRED: Do you approve mailbox migration for these employees?

We need your approval to migrate your employees’ mailboxes to Microsoft Exchange on <Date>. If we do not receive your approval, the following employees will not be migrated.

ACTION REQUIRED

Review the list of your employees and respond to this email to let us know if they can be migrated.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Migrate?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shaun Adams</td>
<td></td>
</tr>
<tr>
<td>John Hessel</td>
<td></td>
</tr>
</tbody>
</table>

In the “Migrate?” column next to the employee, please indicate “Yes” to approve mailbox migration. If someone’s mailbox cannot be migrated, or if you do not want them to be migrated at this time, include that information in the “Migrate?” column.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>
One Month Prior – User Email

Title: ACTION REQUIRED: We are migrating your mailbox to Microsoft Exchange!

Your mailbox will be migrated to Microsoft Exchange on <Date, Day, and Time>. Please complete the tasks that you must perform before your email can be migrated. There are also several actions you can take before migration to improve your Microsoft Exchange experience.

See ACTION REQUIRED BEFORE MIGRATION <insert link to before migration instructions on your Intranet site> to prepare for your migration.

You can also preview what you will need to do after your mailbox has been migrated. See ACTION REQUIRED AFTER MIGRATION <insert link to after migration instructions on your Intranet site> to preview this information.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>
One Week Prior – User Email

Title: IMPORTANT! - ACTION REQUIRED: We are migrating your mailbox to Microsoft Exchange!

We are migrating your mailboxes to Microsoft Exchange on <Date>. If you do not complete the required actions by <Date – today’s date + 1 day> your mailbox will not be migrated.

If you have already completed the actions required before migration, please ignore this email.

See ACTION REQUIRED BEFORE MIGRATION <insert link to before migration instructions on your Intranet site> to prepare for your migration.

You can also preview what you will need to do after your mailbox has been migrated. See ACTION REQUIRED AFTER MIGRATION <insert link to after migration instructions on your Intranet site> to preview this information.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>
One Week Prior – General Email

Note to Microsoft Exchange Administrator: This email goes to everyone who has completed the migration survey and is ready to migrate. Instructions for taking the migration survey are included in the ACTION REQUIRED BEFORE MIGRATION document.

Title: NOTIFICATION: We are migrating your mailbox to Microsoft Exchange!

Congratulations! Your mailbox is ready to be migrated on <Date>.

You can continue to use your current mailbox as usual until your mailbox is migrated to Microsoft Exchange. After your mailbox has been migrated, you will receive a Welcome Email with your Microsoft Exchange logon credentials and a link to instructions describing how to set up and use your new Microsoft Exchange mailbox. For a preview of those instructions, see ACTION REQUIRED AFTER MIGRATION <insert link to after migration instructions on your Intranet site>.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>
One Week Prior – Manager and Support Email

Note to Microsoft Exchange Administrator: This email goes to the managers of the employees whose mailboxes are being migrated, and the designated migration administrators and support people.

Title: NOTIFICATION: These people will be migrated to Microsoft Exchange on <Date>.

The following people will be migrated to Microsoft Exchange on <Date>:

<table>
<thead>
<tr>
<th>Employee</th>
<th>Other?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shaun Adams</td>
<td></td>
</tr>
<tr>
<td>John Hessel</td>
<td></td>
</tr>
</tbody>
</table>

Migration will begin at <Time> on <Day> and is expected to be completed by <Time>, <Day>.

The employees whose mailboxes are being migrated will receive a reminder email the day before their migration. When their migration is complete, they will receive a Welcome Email with instructions describing how to use their Microsoft Exchange mailbox.

The following people will be performing the migration:

- Administrator 1: <Name>
- Administrator 2: <Name>
- Administrator 3: <Name>

The following Support people will be available by phone, <phone number> and by email, <Support Alias>.

- Support Person 1: <Name>
- Support Person 2: <Name>
- Support Person 3: <Name>
Support coverage will begin at <Start Time> and run through <End Time> until this group has been successfully migrated.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>

One Day Prior – General Email

Note to Microsoft Exchange Administrator: This email goes to everyone who has completed the migration survey and is ready to migrate. Instructions for taking the migration survey are included in the ACTION REQUIRED BEFORE MIGRATION document.

Title: REMINDER: We will migrate your mailbox to Microsoft Exchange tomorrow!
Migration will begin at <Time> and is expected to be completed by <Time>. Support will be available by phone, <phone number> and by email, <Support Alias>.

You can continue to use your current mailbox as usual until your mailbox is migrated to Microsoft Exchange. After your mailbox has been migrated, you will receive a Welcome Email with your Microsoft Exchange logon credentials and a link <insert link to instructions describing how to set up your new mailbox on your Intranet site> to the instructions describing how to set up and use your new Microsoft Exchange mailbox.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>
After Migration – Welcome Email

Note to Microsoft Exchange Administrator: This email goes to everyone who has been successfully migrated after the migration team has verified that the employees’ mailbox migration and forwarding has been successfully accomplished. It can be emailed or printed and distributed by hand.

Subject: ACTION REQUIRED: Get connected to Microsoft Exchange!

Congratulations! Your mailbox has been successfully migrated to Microsoft Exchange.

Your new logon credentials are:
User name: <username>@example.com
Temporary password: <password>

There are many tasks that you must perform now that your email has been migrated. We recommend setting aside two or three hours to complete them. To review the instructions and perform the tasks, see ACTION REQUIRED AFTER MIGRATION <insert link to after migration instructions on your Intranet site>.

If you have any questions, check the Microsoft Exchange FAQ <insert link to Microsoft Exchange FAQ> and the Microsoft Exchange Known Issues <insert link to Microsoft Exchange Known Issues>, or contact support <insert your support contact information>.

Thank you,

<Your Migration or Support Contact Alias>
Appendix C: Sample Before and After Migration Procedures

Building an Effective Email Communication Plan contains sample lists of suggested tasks that users should complete before and after the migration to Microsoft Exchange, as well as sample steps users need to take to set up their mobile devices.

Please edit the sample documents to suit your particular situation.

Top 10 Things to do Before Your Account Migrates

Before your account migrates to Outlook 2013, there are a number of things you should do to help ensure a smooth transition and safeguard items that will not migrate.

Should you have any questions, please contact the IT department at <IT or Help Desk email address> or <IT or Help Desk phone number>.

1. Request to have your archive migrated if you have a GroupWise archive and wish to have its contents remain after your account is migrated.

2. Locate items in your account (and archive) that are 25 MB and over in size and either store them outside of GroupWise or delete them. (Applicable to migrations to Office 365.)

3. Ensure your over account size is less than 25 gigabytes (GB) in size. Office 365 accounts have 25 GB quotas, and any data that exceeds this limit will not migrate. (Applicable to migrations to Office 365.)


5. Disable Junk Mail Handling to allow all mail to enter your new account. Leaving these settings enabled will prevent email you want to screen from being delivered.

6. Export backup copies of your address books to ensure aspects that do not migrate are preserved. Some less commonly used fields do not migrate and neither do Frequent Contacts.

7. Make note of access to aspects of other accounts granted to you, such as calendars, address books, folders, and proxy rights. These will be available to you in Outlook, but you’ll need to go through a process to claim them.
8. Save copies of any needed GroupWise Messenger conversations.

9. Check out the documentation on Outlook Web App and on getting your mobile devices configured. You’ll need to wait until your account is migrated to use these, but you can get a head start on learning about them.

10. Bookmark or print a copy of the Top 10 Things to do After Your Account Migrates page so that you can get connected an up to speed right away!

**Top 10 Things to do After Your Account Migrates**

Once your account has migrated to Exchange, you will likely want to log in, set things up as you like them, and reconnect to any resources that are shared with you. The tasks listed below provide you with the information you need for getting completely set up with your Outlook account.

Should you have any questions, please contact the IT department at <IT or Help Desk email address> or <IT or Help Desk phone number>.

1. Connect to your email, calendar, contacts, and task list.

2. Connect your mobile devices.

3. Confirm that all items expected to be in your account are available.

4. Set up your email signature.

5. Reconnect to shared email accounts.

6. Reconnect to shared calendars.

7. Re-create any rules you used previously in GroupWise.

8. Check Junk Mail regularly to confirm messages haven’t been sent there unexpectedly. Also, set up your Junk Mail preferences.

9. Check out Lync for instant messaging with text, voice, and video. *(If using Lync.)*

10. Visit our Documentation and Training pages to learn how to get the most out of Outlook 2013.
Setting Up Your Mobile Devices

SMARTPHONES AND OTHER MOBILE DEVICES

Almost all mobile devices have an Exchange compatible email client. Using POP/IMAP/SMTP for these devices is not recommended.

Typical Smartphones (iPhone, iPad, Android, Windows Mobile)

When setting up your device, the following information will be requested:

Email Address
Enter the address you use as your preferred email address (e.g., <username@domain.xyz>).

Login Name
Enter your username (or ID). Sometimes you may need to enter "<domain>\" (without quotes) followed by your username (or ID).

Password
Enter your corresponding password.

Domain
Enter "<domain>\" (without quotes).

Server
Enter "<owa.domain.xyz>\" (without quotes).

BlackBerry Users

BlackBerry users will need to contact the HelpDesk to get their devices working. Be aware that settings will have to change, and that it is likely your BlackBerry will need to be reset to factory defaults. If you are currently using the GroupWise system’s BlackBerry Enterprise Server (BES), the device will undergo a similar setup as before. If you are currently using POP/IMAP/SMTP or another email configuration, significant changes will be required to the way you currently connect to email.
The following suggestions will help make transitioning connecting your BlackBerry to the Exchange system much more pleasant:

1. Be sure that your BlackBerry is on an Enterprise Plan with your phone company – otherwise it won’t connect to the BES.

2. Back up your contacts (and everything else) using your desktop software before requesting to connect to the BES.

3. Plan to spend at least three hours at the HelpDesk to get your BlackBerry connected to Exchange.

4. Know your phone – some people move the icons (e.g., for settings/options) around and looking for them may take a lot of time.

Getting Help
All devices and email clients are different. If you are having trouble getting yours set up, please contact the HelpDesk at <phone number or extension> for help.

About Netmail
100% employee owned, Messaging Architects is a global market leader of Integrated Email Management solutions and services. For over 10 years, our award-winning Netmail™ platform has helped hundreds of organizations worldwide eliminate complexity, ensure compliance and enhance productivity. To learn more about lowering your operating costs by intelligently mitigating Email risks, please visit our website at www.netmail.com.