# TABLE OF CONTENTS

- INTRODUCTION .......................................................... 3
- IS OFFICE 365 WORTH THE MOVE? ............................... 3
- MAKING THE MOVE – WHO’S GOING TO MANAGE OFFICE 365?.... 4
- MAKING THE MOVE – OFFICE 365 PRE-MIGRATION CHECKLIST..... 4
- A BETTER PATH TO OFFICE 365 ..................................... 5
- OFFICE 365 MIGRATION AND ONBOARDING AT RACKSPACE ...... 5
- SELF-SERVICE MIGRATIONS .......................................... 6
- WHAT IS MIGRATED VIA THE TOOL? ............................... 6
- MIGRATIONS PATH FOR NON-EMAIL DATA ....................... 6
- CONTINUE THE CONVERSATION .................................... 6
- FOOTNOTES .................................................................. 6
Many businesses deploy Office 365® on their own and expect things to go smoothly. But implementing a sprawling, complex collaboration and productivity tool like Office 365 without the right planning and expertise can be risky. Office 365 migrations not only call for all the normal migration best practices, they are complicated by the following factors:

- The mission-critical nature of the applications in the suite – A small blip in email or conferencing availability could have a huge impact on business operations.
- Office 365 comprises multiple apps in one suite, which means you could be migrating email, in addition to other data, during the upgrade.
- Limited support from Microsoft—a common complaint for those new to Office 365—makes it difficult to customize solutions and troubleshoot migration issues.

We know. Because we’ve overcome these obstacles and dozens more to help organizations deploy and optimize Office 365. Our expertise and outcomes in migrating and running thousands of Microsoft® environments has earned us the distinction of being the only five-time Microsoft Hosting Partner of Year. We hold Microsoft Gold Certifications in numerous specializations, including Cloud Productivity and Collaboration and Content. In this guide, we cover lessons we’ve learned along the way, including migration tips and solutions to ease your Office 365 transition.

IS OFFICE 365 WORTH THE MOVE?

Office 365 is the future of office productivity and collaboration tools. But the question facing each organization is—when is the time right for us to make the switch? Whether you opt for the big leap to the cloud or the hybrid deployment option, Office 365 can help your organization realize the following benefits:

- **Productivity Gains** – Compatibility across platforms allows users to access files and documents from any device with anytime/anywhere access to work generated with Office 2016 products. The sharing and collaboration features in Office 365 allow tracking of updates to documents and spreadsheets across an entire organization. When users can access and work on company documents from any device, from any location, they can connect the right people, ideas and information to be productive regardless of their location.

- **Predictable & Manageable Costs** – Migrating to the Office 2016 suite within Office 365 gives an organization the flexibility to scale up or down with a predictable cost structure. Pay for what you use, nothing more. The same applies to individual Client Access Licensing costs for Exchange, SharePoint or Skype for Business. Rather than committing to expensive licensing on long-term contracts with Microsoft, for those organizations that chose volume licensing agreements with Software Assurance from Microsoft, Office 365 offers a more flexible arrangement with a familiar cost structure.

- **Always Up-to-Date** – Regardless of deployment type, Office 365 subscribers have access to the latest version of Office products with built-in, customizable security and privacy controls to help keep your data safe and accessible. In the past, access to new versions of Office involved the purchase of new licenses or the maintenance of Software Assurance agreements from Microsoft. Office 365 obviates the need for messy upgrades or maintenance packages solely for the purposes of maintaining current versions of Office, Exchange, SharePoint and other apps in the suite.

However, organizations may face hurdles when trying to get the full benefit of Office 365:

1. Limited resources and lack of in-house expertise to migrate and manage Office 365
2. Emergence of the remote workforce and required support to set up, secure and manage mobile devices
3. Poor support experiences with vendors or other providers
4. User adoption and feature utilization needed to realize the full potential of the suite
5. Customizing security and compliance controls as it relates to your company’s security, privacy and compliance policies

72% of organizations using Office 365 reported increased collaboration.  
42% of companies saw an increase in worker productivity due to Office 365 mobile features. 
30 minutes saved per day with better business intelligence with Office 365.

ROI of 321% compared to an on-premises deployment.  
Average 10% reduction in legacy systems support, licensing and procurement costs using Office 365 vs. an on-premises Microsoft Office solution.
MAKING THE MOVE – WHO’S GOING TO MANAGE OFFICE 365?

Your first decision will be how to run Office 365. You have two main options – license via Microsoft and self-manage, or enlist a provider to handle licensing, configuration and daily operations for you. Here’s a comparison of self-managing Office 365 against using a provider like Rackspace:

<table>
<thead>
<tr>
<th>Self-Managed</th>
<th>Rackspace Managed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expertise</strong></td>
<td></td>
</tr>
<tr>
<td>You implement (or hire someone to implement) Office 365 and address compatibility issues, constant changes and ongoing management needs yourself.</td>
<td>Access to over 250 specialists with over 1000 Microsoft certifications and the knowledge and support to ease ongoing management.</td>
</tr>
<tr>
<td><strong>Daily Management</strong></td>
<td></td>
</tr>
<tr>
<td>You handle navigating the Microsoft control panel, troubleshooting, potential outages, security and connectivity directly with Microsoft support.</td>
<td>Simplified Office 365 control panel and 24x7x365 front line support with escalated prioritizations as needed.</td>
</tr>
<tr>
<td><strong>Migration</strong></td>
<td></td>
</tr>
<tr>
<td>You handle migration planning and execution.</td>
<td>Office 365 migration experts help organize your transition and migrate your email data.</td>
</tr>
<tr>
<td><strong>Configuration</strong></td>
<td></td>
</tr>
<tr>
<td>You handle populating and updating user information and settings.</td>
<td>Answers to questions about setup and preconfigured encryption service available.</td>
</tr>
<tr>
<td><strong>Optimization</strong></td>
<td></td>
</tr>
<tr>
<td>You develop a deep level of understanding of the application in order to evolve it with your business.</td>
<td>Optional services for consultative help with ongoing strategy and optimization.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security</th>
<th>Support</th>
<th>Billing</th>
</tr>
</thead>
<tbody>
<tr>
<td>You’re responsible for applying needed security settings and managing tools for security and encryption.</td>
<td>Limited support options.</td>
<td>Ongoing payments, long-term contracts.</td>
</tr>
<tr>
<td>Easily apply security settings such as email encryption from the Rackspace Control Panel.</td>
<td>Unlimited, 24x7x365 support.</td>
<td>Pay as you go, flexible billing.</td>
</tr>
</tbody>
</table>

MAKING THE MOVE – OFFICE 365 PRE-MIGRATION CHECKLIST

After you’ve determined how you’ll manage Office 365, it’s time to start preparing for migration.

1. Inventory your current environment

Your inventory should include:

- User accounts, login names and email addresses.
- Number and size of mailboxes (including shared mailboxes and conference rooms).
- Client versions and configurations (browsers, operating systems, office applications, mobile versions, and so on).
- Network settings (DNS hosts, proxy and/or firewall configuration, internet connectivity).
- File storage locations (file shares, intranet file storage).
- Intranet sites to be migrated.
- Online meeting and Instant Messaging systems to be migrated.
- Critical integrations with mail-enabled programs, workflow systems, CRM and ecommerce applications.

2. Prepare data for migration

- Clean up active directory accounts using the Office 365 IdFix tool.
- Get your data ready for a migration:
  - Clean up duplicate files.
  - The SharePoint Online library in Office 365 can only upload files up to 2 GB in size with base storage set at 500 MB per subscribed user, so plan accordingly.
  - Include solutions for archived email and data.
- Update client software versions. If you’re running older software versions, you may need to update or manipulate data to move it into Office 365.
- Determine solutions to manage archiving and additional security if needed.

3. Make key deployment decisions

- Create a plan for creating, synchronizing and authenticating user accounts.
- Resolve any short or long-term integration with on-premises systems.
- Decide and plan for remote or network connectivity.
- Establish a plan to decommission disparate apps post-migration.

4. Communication and Educate

- Notify users and prepare training materials.
- Detail any changes in functionality, access and actions users need to take. Those items might include:
  - New interface and login for mailboxes
  - Mail client server settings and mobile setup
  - Mailbox password requirements
  - Mailbox storage size limits
  - Mailbox permissions
  - Collaboration processes
  - Spam filtering
  - Signature formatting
Types of Office 365 Migrations:
• Cutover: Moves all the mailboxes and data in one operation
• Third party: Enlist a consultant or set of tools to perform the entire migration
• Assisted: Migration guided by the provider who will be responsible for the ongoing maintenance of the application suite

OFFICE 365 MIGRATION AND ONBOARDING AT RACKSPACE

Our Office 365 migration services include a team of migration specialists who onboard you as efficiently and painlessly as possible. With thousands of migrations under our belt, we can help you navigate the various components of the migration process. We currently offer two levels of migration services: a self-service migration offering and an assisted migration option.

Assisted Migrations
Our migration service is designed to aid businesses in need of a specialist to manage their entire email migration project. In order to reduce the amount of work involved for you, we provide all of the following with our assisted migration service:
• A Dedicated Migration Specialist available to you
• A two-pass migration plan that migrates mail, contacts and calendar data for mailboxes under 50GB each
• DNS guidance for the Going Live phase
• Email Client and Mobile Device setup for end users via one of our unique Rackspace tools

Your migration specialist works with you to help resolve any and all issues that may arise during the migration process. After your migration is complete, our Office 365 support team will be available for all future questions and assistance.

WHAT IS MIGRATED VIA THE TOOL?

You can use this tool to migrate the following items, according to the supported system you’re utilizing:
• Microsoft Office 365: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, Server-Side Rules, Folder Permissions, BCC Recipients
• Exchange Server 2003 (Source Only): Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes
• Exchange Server 2007+: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, BCC Recipients
• Exchange Server 2010 SP1+: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, Server-Side Rules, Folder Permissions, BCC Recipients
• Google Apps/Gmail: Inbox, Folders/Labels, Emails, Contacts, Calendars
• GroupWise 7+: Inbox, Folders/Labels, Emails, Contacts, Calendars
• Lotus Notes 6.5+: Inbox, Folders, Emails, Contacts, Calendars, Tasks
• Zimbra 6+: Inbox, Folders, Emails, Contacts, Calendars, Tasks
• IMAP
• POP (Source Only): Inbox, Emails
• Open-Xchange
• Amazon S3: Inbox, Folders, Emails, Contacts, Calendars, Tasks, Journals, Notes, Server-Side Rules

Migration path for non-email data
We will guide you through migrating all of your email data. If you have existing data in the following Office 365 applications, we’re happy to discuss how you can create a migration plan.

### Phase | Activities
--- | ---
Planning | Gather information about current environment
Testing | Create migration project
| Test connectivity to source environment
| Prepare for data migration of all mailboxes
Migrating | Initiate migration (1st Pass)
| Verify completion of migration
Go Live | Update MX records for domain (contact DNS provider)
| Verify MX records have been updated
| Configure Autodiscover
Second Pass | Initiate a 2nd migration to retrieve inconsistent email data after MX record change
| Verify completion of 2nd pass migration
Post-Migration Check | Provide email client and mobile device setup instructions
| Ensure connectivity and test mail flow

Self-service Migrations
We provide you with a reliable, easy tool to start and finish the migration at your leisure. The free tool is housed within your Rackspace control panel. And if you have any questions, our migration experts are available to help.
A BETTER PATH TO OFFICE 365

For most businesses, an assisted migration offers the least disruption and best ROI for running Office 365 from migration through ongoing maintenance and troubleshooting. But, not every provider has the right expertise, support structure and infrastructure to run Office 365 in line with your business goals.

Rackspace Microsoft Certified Professionals have been helping customers overcome the complexity of adopting Microsoft technologies for more than 15 years. Across multiple clouds, Rackspace blends technology and automation with human expertise to deliver ongoing architecture, security and 24x7x365 operations support to help ensure you get the most out of your Microsoft investments. We migrate over 50,000 users each month and have seen just about every migration scenario — from small businesses with a few users to large businesses with thousands of users.

OFFICE 365 OPTIONS AT RACKSPACE

FANATICAL SUPPORT FOR OFFICE 365
Licensing + Fanatical Support
- Choice of 13 Office 365 licensing plans
- 24x7x365 live, US-based support via phone, chat and email
- No limit on the number of tickets and requests per month, and never any per-incident charges
- Free email migration, deployment assistance and daily troubleshooting for the entire suite
- Prioritized Microsoft support escalations
- Add-on security and compliance solutions like email encryption, email archiving and Microsoft® Azure™ Rights Management

MANAGED SERVICES FOR OFFICE 365
Support and Advisory Services*
- Fanatical Support* for Office 365, plus:
  - Proactive guidance and advisory services to include:
    - Technical account manager and technical account reviews
    - Training for new features
    - Technical road map assistance
  - Ideal for large and complex Office 365 deployments
- Available for Office 365 plans purchased from Rackspace, directly from Microsoft or from a third-party provider

CONTINUE THE CONVERSATION

To learn more about our Office 365 offering and migration services, contact a Rackspace Office 365 specialist today at 1-866-201-7852.

Or, explore more resources related to migrating and running Office 365:
- Maximize your Office 365 Investment: https://dab35129f0361dca3159-2fe04d8054667fada6c4002811ecce5fssl.cf1.rackcdn.com/
- Self-Service Email Migration Demo: https://www.youtube.com/watch?v=QpkedvNUrE.

FOOTNOTES

ABOUT RACKSPACE
Rackspace, the #1 managed cloud company, helps businesses tap the power of cloud computing without the complexity and cost of managing it on their own. Rackspace engineers deliver specialized expertise, easy-to-use tools, and Fanatical Support® for leading technologies developed by AWS, Google, Microsoft, OpenStack, VMware and others. The company serves customers in 120 countries, including more than half of the FORTUNE 100. Rackspace was named a leader in the 2015 Gartner Magic Quadrant for Cloud-Enabled Managed Hosting, and has been honored by Fortune, Forbes, and others as one of the best companies to work for.

Learn more at www.rackspace.com or call us at 1-800-961-2888.

© 2016 Rackspace US, Inc.

This document is provided "AS IS" and is a general introduction to the service described. You should not rely solely on this document to decide whether to purchase the service. Features, benefits and/or pricing presented depend on specific configuration and are subject to change without notice. Rackspace disclaims any representation, express or implied warranties, including any implied warranty of merchantability, fitness for a particular purpose, and non-infringement, or other commitment regarding the services except for those expressly stated in a Rackspace services agreement. This document is a general guide and is not legal advice, or an instruction manual. Your implementation of the measures described may not result in your compliance with any other standard. This document may include examples of solutions that include non-Rackspace products or services. Except as expressly stated in its services agreements, Rackspace does not support, and disclaims all legal responsibility for, third party products and services. Unless otherwise agreed to in a Rackspace service agreement, you must work directly with third parties to obtain their products and services and related support under separate legal terms between you and the third party.

Rackspace cannot guarantee the accuracy of any information presented after the date of publication.

Rackspace®, Fanatical Support®, and other Rackspace marks are service marks or registered service marks of Rackspace US, Inc. and are registered in the United States and other countries. Other Rackspace or third party trademarks, service marks, images, products and brands remain the sole property of their respective holders and do not imply endorsement or sponsorship.