

March 26, 2004

How To Ensure Email Migration Project Success

by Erica Rugullies and Jonathan Penn

BEST PRACTICES

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EXECUTIVE SUMMARY

Many midsize and large companies have completed email migration projects in the past couple of years, and many more have projects in the works. These firms are being driven by significant vendor product changes as well as IT issues. Firms about to embark on email migration projects have an opportunity to learn from the successes and mistakes of others. Especially forward-thinking firms will take the migration project as an opportunity to develop or refine their enterprise collaboration strategies.

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NOTES & RESOURCES

Forrester interviewed software vendors (CompuSven, IBM, Microsoft, Novell, Oracle, and Wingra Technologies), systems integration firms (Avanade, Connectria, Hewlett-Packard Services, and IBM Global Services) and user companies informally during the past year through the client inquiry, consulting, and vendor briefing processes. We also conducted five formal, anonymous user interviews for this report.

Related Research

“Live from Lotusphere 2004: Shift to J2EE Under Way”

February 3, 2004, IdeaByte

“Impose Message and Mailbox Size Limits to Meet E-Mail Service-Level Agreements”

January 28, 2004, IdeaByte

“Control Broadcast Email via Policy and System Configuration”

December 8, 2003, IdeaByte

VENDORS BRING THE EMAIL MIGRATION ISSUE TO THE FORE

Many organizations today are driven to seek an alternative email platform by changes in the vendor landscape. To learn more, Forrester spoke with a number of companies about their migrations. Some companies make a switch because of perceived changes in vendor market share. Others switch as a result of vendors' sweeping technology changes. Technology innovations provide customers with flexibility, functionality, and cost benefits. But to obtain these benefits, customers must overhaul their messaging infrastructures because:

- **IBM is changing architectures.** IBM is developing a new collaborative platform, called Lotus Workplace, based on Java 2 Enterprise Edition (J2EE), WebSphere Application Server, WebSphere Portal, and the DB2 database.¹ During the next couple of years, IBM will release an enterprise messaging platform built on Lotus Workplace that is comparable with Notes/Domino or Microsoft Exchange. And this year IBM plans to release Lotus Workplace team collaboration functionality that is comparable with Lotus Instant Messaging and Web Conferencing (Sametime) and Lotus Team Workplace (QuickPlace).
- **Microsoft has copious new versions.** Within the past year, Microsoft launched new versions (version 2003) of the Windows operating system, SharePoint Team Services technology (now called Windows SharePoint Services), SharePoint Portal Server, Exchange Server, and Office applications, as well as new products like Live Meeting, Live Communications Server, and Rights Management Server. The next major release of Exchange Server is expected to run on a SQL database (which is something Oracle currently provides with Oracle Collaboration Suite and IBM provides with Lotus Workplace Messaging, a lightweight email application), and the Windows file system will be replaced by an XML-based file system.
- **Novell is reinventing itself.** Novell is pursuing a strategy centered around Linux. The company has made a number of Linux acquisitions and is about to launch a Linux version of GroupWise 6.5, with an enhanced version, code-named Sequoia, due out later this year. Sequoia will have team collaboration, instant messaging, file synchronization/file sharing, and other new functionality.
- **Componentization and standards are on the horizon.** Leading messaging and collaboration platform vendors will continue their push toward componentization of collaboration functionality, making contextual collaboration a reality.² And unified synchronized communications (USC) will become recognized as the new standard for effective business communications within five to six years.³ USC combines communications capabilities like telephone and paging services, voicemail, call

forwarding, and video and audio conferencing with collaboration capabilities like email, calendaring, instant messaging, presence awareness, Web conferencing, discussion threads, and whiteboarding. Users will gain advanced functionality like the ability to provide contacts with a single contact address and receive communications in the medium of their choice, such as phone, email, instant message, based on criteria they supply like sender's identity, recipient's availability, and the ability to see on their computer screens which participant in an audio conference is currently speaking.

IT Has Many Problems To Tackle

While the shifting vendor landscape is creating a sense of urgency, other drivers behind email migration projects are IT-related, and some are acute:

- **Mergers and acquisitions (M&A) require subsequent technology rationalization.** Email migration projects are sometimes part of the technology rationalization and standardization fallout from M&A. These projects are usually driven by the need to reduce IT costs. In some cases, the project is highly politically charged. Project teams should attempt to convince senior management that an in-depth IT and user needs analysis and product evaluation, rather than standardizing on one product or another just for the sake of standardization, is the way to go; it will save the company money in the long run and lay the groundwork for future flexibility options.
- **End users demand more functionality and integration.** Knowledge workers are requesting collaboration features like instant messaging, team workspaces, document collaboration, application sharing, and workflow. And end users are increasingly demanding support for remote, mobile, and offline use and integration with desktop productivity applications (most often Microsoft Office) and line-of-business applications, such as document management, project management, and product life-cycle management:

“It was hard to find third-party products that interfaced with our old messaging platform. PDAs are a good example. We always had to buy third-party software to integrate with it.” (Director of IT, city government agency)

- **The infrastructure is brittle and aging.** When evaluating email infrastructure, IT must also tackle issues of scalability, reliability, and availability of third-party add-on products like anti-virus, anti-spam, and message archiving. A lack of these can cement the platform choice. Furthermore, firms are worrying about platform obsolescence:

“Our rule is that when the horse dies, you dismount. The vendor we were using was the horse and it was getting weak. So we got off.” (IT executive, state government agency)

- **Expertise is often scarce.** Some customers of Novell and other vendors have encountered difficulty finding and hiring needed skills. The same is not true for Microsoft Exchange. IT organizations that are faced with cost-cutting measures are trying to consolidate skills and reduce headcount. Often they can find Exchange administrators and developers who are skilled on other Microsoft products and technologies, such as Windows Server, .NET framework, Visual Basic, Windows SharePoint Services and SharePoint Portal Server.
- **Firms are developing enterprise collaboration strategies.** Companies that have moved beyond the experimentation phase of collaboration recognize that the proliferation of tools is a problem. These firms are increasingly making enterprise messaging platform decisions in the context of enterprise collaboration strategies.⁴ They are exploring the full range of collaboration capabilities from vendors like IBM, Microsoft, Novell, Oracle, and Sun, and are exploring ways those capabilities can be embedded in work processes, which is also known as contextual collaboration. With strategies in place, these firms want all messaging and collaboration functionality from a single vendor — or from multiple tightly integrated solutions. Although taking on the whole world of collaboration tools is beyond the scope of an email migration project, the project should not be undertaken without discussing enterprise collaboration strategy.

USE TEI™ TO DECIDE IF THE COST OF EMAIL MIGRATION IS WORTH IT

IT is increasingly required to present a business case to get funding for projects. Email migrations are no exception. Without a business case, firms can get stuck in the decision-making process:

“The problem was that there was more debate than there should have been at the management level. We had to look at alternative solutions and had to justify this move versus staying on Exchange 5.5. We spent more time on those discussions than on doing the technical planning and work.” (Infrastructure consultant, financial services company)

To make (or break) the business case for an email migration project, firms should use the Total Economic Impact™ (TEI) model, which takes into account the costs, benefits, future flexibility options, and risk of IT investments:⁵

- **Include the cost of doing nothing.** Be aware that there is no such thing as altogether avoiding the cost of an email upgrade if you are using an older product or a product from a vendor whose market share is on the decline. It is just a matter of time. When conducting an enterprise messaging and collaboration platform TEI analysis, the status quo should be compared with the TEI of migrating to a new platform. Most companies that conduct such analyses will find that the main benefit of not upgrading is cost deferral. If the choice is not whether to migrate, but which platform to migrate to, the TEI of two or more solutions can be compared.
- **Migration costs vary by vendor.** The total cost includes not only client and server software licenses and maintenance and upgrade fees, but also hardware, new data centers (for example, when moving from a centralized mainframe environment to a distributed client/server environment), and user and IT staff training, which results in loss of end user productivity and unplanned utilization of IT resources, data migration, development costs to port applications to the new system, or to redesign them, and administration. Consulting resources to help with an email migration project can be a significant additional cost.
- **Benefits are distributed across the enterprise.** Some benefits apply to IT, such as server or data center consolidation, ease of administration (backup and recovery), reduced administration requirements (new user setup), and reduced user support requirements (due to user interface and performance improvements). End users benefit from reduced time spent getting training and support, streamlined work tasks due to integration with desktop and line-of-business applications, and increased opportunity to use new tools to collaborate. An email migration also offers an opportunity to extend email usage to an expanded set of users such as factory or retail floor staff or flight attendants. These users can access their email via kiosks and shared workstations. Still other benefits are derived by improving specific business processes and are calculated using metrics like customer retention, customer satisfaction, market share, profitability, cash flow, cycle-time reductions, and reduction in rework.
- **Future flexibility is a factor.** Future flexibility options can be looked at much like a financial purchase option. With a financial option, one can purchase the right to acquire a stock or property for a price negotiated today. In the same regard, investing in additional infrastructure above today's needs can enable the deployment of future applications. In many cases, these applications may not yet be identified or budgeted, but the organization's ability to take these actions in the future has value, often after additional investment is made (see Figure 1). In general, vendors that deliver an array of collaboration capabilities, including messaging, can deliver greater benefit and future flexibility than vendors that provide only a messaging/calendaring/contacts platform.

Figure 1 Consider Future Flexibility Options During Email Migration

Future flexibility option	Details
Communities of practice	Using functionality like team workspaces, discussion threads, document collaboration, instant messaging, and presence awareness, the firm can set up knowledge bases that people in similar roles in far-flung parts of the organization (for example, research, competitive intelligence, finance, procurement) can use to share best practices and locate expertise.
Collaboration with customers and suppliers	Using real-time collaboration tools like instant messaging and Web conferencing, the firm can integrate unstructured collaboration capabilities into a structured workflow, thereby handling exceptions more quickly and reducing the number of errors.
Unified synchronized communications	Based on the vendor’s Session Initiation Protocol platform, integrated with enterprise telephony systems, employees will be able to locate each other, communicate, and collaborate more quickly and effectively than ever before.
Contextual collaboration	When collaboration features are made accessible via transactional applications like ERP and CRM, people can collaborate with each other within the context of the applications they use to do their jobs, thereby increasing the likelihood of the tools being used and the ability of the tools to provide value.

Source: Forrester Research, Inc.

- **Risk factors increase the cost or reduce the benefit.** Risk factors associated with email migrations include unexpected infrastructure upgrades, unplanned downtime, and cultural barriers to collaboration (see Figure 2). In most cases, the risk of maintaining the status quo is greater than the risks of migrating to a new platform. An exception may be when the customer is waiting for the vendor of choice to offer a more mature product, such as in the case of IBM Lotus Workplace.

ADHERE TO EMAIL MIGRATION BEST PRACTICES

Firms that report success with their email migration projects attribute it to a number of factors. With executive sponsorship, successful firms assemble the right teams, plan their projects thoroughly, and use care when migrating their data (see Figure 3). Executive sponsorship at the C level or above gives the IT department insight into how all parts of the business use messaging and collaboration software by facilitating interaction between groups and functions that don’t ordinarily communicate. Executive sponsorship also lends authority to important decisions like which target system is selected, what the cutover dates and migration time frame will be, and how far to expand the scope of the project beyond messaging to collaboration.

Figure 2 To Migrate Or Not To Migrate: Either Way, Risks Abound

Risks of migrating to new enterprise messaging and collaboration platform	Risks of maintaining status quo
Expected benefits require more products and technologies than originally thought, driving up costs.	Vendor support for installed product is discontinued, driving up maintenance costs.
Infrastructure (operating systems, networks) requires upgrading, driving up costs.	Gap between the firm’s messaging and collaboration environment and state of the art grows wider, reducing the firm’s ability to drive efficiencies, innovate, and differentiate.
Key benefit is collaboration, but organizational culture does not foster collaboration, driving down the benefit.	Security exposures.
Senior management support is absent, leading to increased costs (e.g., delays, project incompleteness) and decreased benefits (e.g., low user adoption).	Lost productivity due to lack of features in versions being used and compatibility issues among installed versions.
User marketing, training, and support is inadequate, resulting in lower than expected adoption and reduced benefit.	Inability to collaborate internally or with customers and suppliers because collaboration groundwork has not been laid.
	Cost of redundant administration, extra connectivity software, etc. in an unrationalized environment.

Source: Forrester Research, Inc.

Phase 1: Assemble The Right Team

The email migration project team should include the following roles: project manager, development lead, testing manager, and user-education manager. Have members be involved from design through implementation and have them participate as peers. Put a strong project manager in charge and reduce that person’s other workload. The project manager should have excellent people and organizational skills and the respect of peers.

Figure 3 Email Migration Project Must Be Done In Three Phases

Success factor	Issue	Recommendation
Phase 1: Assemble the right team		
Hire experts with referenceable customers.	Without outside help, project teams risk underestimating prerequisite steps.	Hire consultants with a migration track record (e.g., Avanade, Connectria, HP Services, or IBM Global Services).
Create a cross-functional collaboration architecture team.	Important parts of the organization may be neglected or opportunities missed.	Create a cross-functional architecture team to gain insight into interdependencies among functional areas, ease organizational resistance, enhance problem solving, and speed decision-making.
Phase 2: Plan the project		
Update and enforce email policy.	Dated policy results in migrating too much data, or failing to comply with government regulations.	Address the length of time messages can be retained, mailbox size limits, maximum message size, and who can send broadcasts and when.
Include message archiving in the project scope.	Migrating data as-is costs the firm an opportunity to reduce storage costs and implement better retention and disposition practices.	Archive old email into third-party archive rather than onto the new mail server.
Pad the user training and support budget.	Without adequate user training, the help desk will be deluged, especially if users are learning a new client.	Conduct formal training either in person or via Web conferencing and give users the option to attend more than one session.
Select the right tools.	Hasty decisions or decisions made for political reasons may increase long-term costs and reduce future flexibility options.	Spend adequate time selecting the right target platform (e.g., IBM, Microsoft, Novell, Oracle, or Sun), migration tools (e.g., CompuSven or Wingra Technologies), and message archiving software.
Phase 3: Do the migration		
Large firms need a coexistence approach.	Trying to migrate thousands of users in a single stage will result in unexpected downtime.	Midsized firms should run tests in the lab to determine whether a single-stage migration is feasible.
Reduce the amount of data to be migrated.	Migrating data as-is takes the maximum possible amount of time.	Have users clean out their mailboxes and implement mailbox size quotas. Migrate only a subset of old data.
Think twice before migrating calendar data.	Common problems include recurring events and free/busy lookups.	Plan on increased administration costs during the coexistence phase if calendar data is being migrated.

Source: Forrester Research, Inc.

- **Hire outside experts.** Email migration consultants save firms time and money with their experience and methodology. Another benefit is third-party objectivity. The messaging and collaboration platform vendors offer consulting services, as do some of the boutique migration tool vendors. A number of consulting firms like Avanade, Atos Origin, Binary Tree, British Telecom, EDS, Hewlett-Packard, IBM Global Services, Siemens Business Services, Syntegra, and Wolcott Systems Group also offer email migration services.⁶
- **Create a cross-functional collaboration architecture team.** The approach that IT organizations take to assigning responsibility for collaboration beyond messaging — Web conferencing, team collaboration, supplier and customer collaboration — depends on corporate strategy, senior IT leadership's philosophy about collaboration, the structure of the IT department, the organization's level of experience with collaboration technologies, and which collaboration products are currently being used or are under evaluation. Firms that are trying to implement an enterprise collaboration strategy should put a cross-functional team in place, led by an architect that has strong management and team-building skills, which comprise members from various functions within IT, such as applications, infrastructure, networking, messaging, and content management, as well as the affected business units.⁷

Phase 2: Plan The Project

The email migration project planning phase should address user needs and requirements as well as those of IT. The project team should be flexible with system design because issues may crop up during testing that require design changes.

- **Update and enforce the email policy.** An email migration project presents an excellent opportunity to update and enforce the organizational email policy. This policy may address traditional quotas — the length of time messages can be retained (such as 90 days, one year), mailbox size limits (typically 50 MB to 100 MB, though IBM says that Notes/Domino customers typically implement 200 MB to 500 MB mailbox size limits) and maximum message size (typically 5 MB to 10 MB).⁸ It may also address methods and policies for message archival, who can send broadcast emails and when, whether users can share address books and folders and with whom, and policies related to viruses and spam.⁹
- **Reduce the amount of data to be migrated.** The typical migration options for mail are: (1) all live mailboxes, (2) mail from a limited period such as the previous 90 days or one year, or (3) all email that fits within the mailbox quota of the new system. Have users clean out their mailboxes prior to the migration. Firms usually migrate all contacts and global distribution lists but personal lists are often manually recreated. Shared folders are typically migrated but calendars are not.

- **Implement message archiving software.** Treatment of email archives is often a topic of heated discussion. Users like to keep everything, just in case, but IT is pained with supporting huge mail stores and legal and records management departments are concerned about keeping records of communications around longer than necessary, while at the same time complying with government regulations. While each firm's situation is different and legal and compliance offices should be involved in decisions about email archiving, in general all companies that wish to be listed on US stock exchanges archive selected emails and attachments for seven years to comply with the Sarbanes-Oxley Act of 2002.¹⁰ Firms should approach message archiving in the context of records management strategy.¹¹
- **Pad the user training and support budget.** Many firms underestimate user training and support needs. Conduct formal user training either in person or via Web conferencing. Give users the option to attend more than one session. Prepare users adequately if they are asked to install software or migrate their own mail, but avoid this situation if possible. Set up an intranet help site containing tips and tricks, information on how to run migration utilities and configure and run the client, and documentation about capabilities and shortcomings of the new software.
- **Select the right tools.** With sufficient requirements gathering, strategy sessions, research, and planning, the firm should be confident that it has selected the right tools — the right target platform, migration tools, and message archiving software. The leading email platform vendors are IBM and Microsoft. For migration tools, firms have a choice of commercially available software from vendors like CompuSven and Wingra Technologies, tools brought in by migration consultants, and tools provided by the messaging platform vendor. The leading message archiving vendors are EMC, IBM, iLumin, KVS, Open Text, and ZANTAZ. Firms that are approaching message archiving in the context of a records management strategy should short-list enterprise content management vendors like EMC, IBM, and Open Text.
- **Set up a prototype lab.** Set up a prototype lab in which the existing environment is duplicated as accurately as possible (hardware, software versions, operating systems). Testing will reveal snafus and give the project team a chance to make changes and prepare users.

Phase 3: Do The Migration

You will have to decide between a single-stage migration and a phased rollout — coexistence with gradual migration (see Figure 4).

- **Smaller firms should shoot for a single-stage rollout.** A direct cutover is not feasible for large organizations but it is the best option for small companies (1,000 users or fewer). In a single-stage rollout, data is extracted from the source system and imported into the new system in one fell swoop. When the new system is live the old system is taken offline. The migration can usually be done over a long weekend, minimizing IT effort and downtime.
- **Large firms require a coexistence period.** When thousands of users need training, desktop software (and sometimes hardware) needs updating, and many gigabytes or even terabytes of data must be moved, midsize to large companies pursue a coexistence strategy. The phased approach requires a period of coexistence between the source and target systems. Data is extracted from the old system, translated into a neutral format via a gateway, and then imported into the new system. Some messages continue to come into the old system once the new system is live, and users may continue to access their old mailboxes. Messages also flow into the new system. Coexistence requires gateways and directory synchronization and substantially more planning than a single-stage migration:

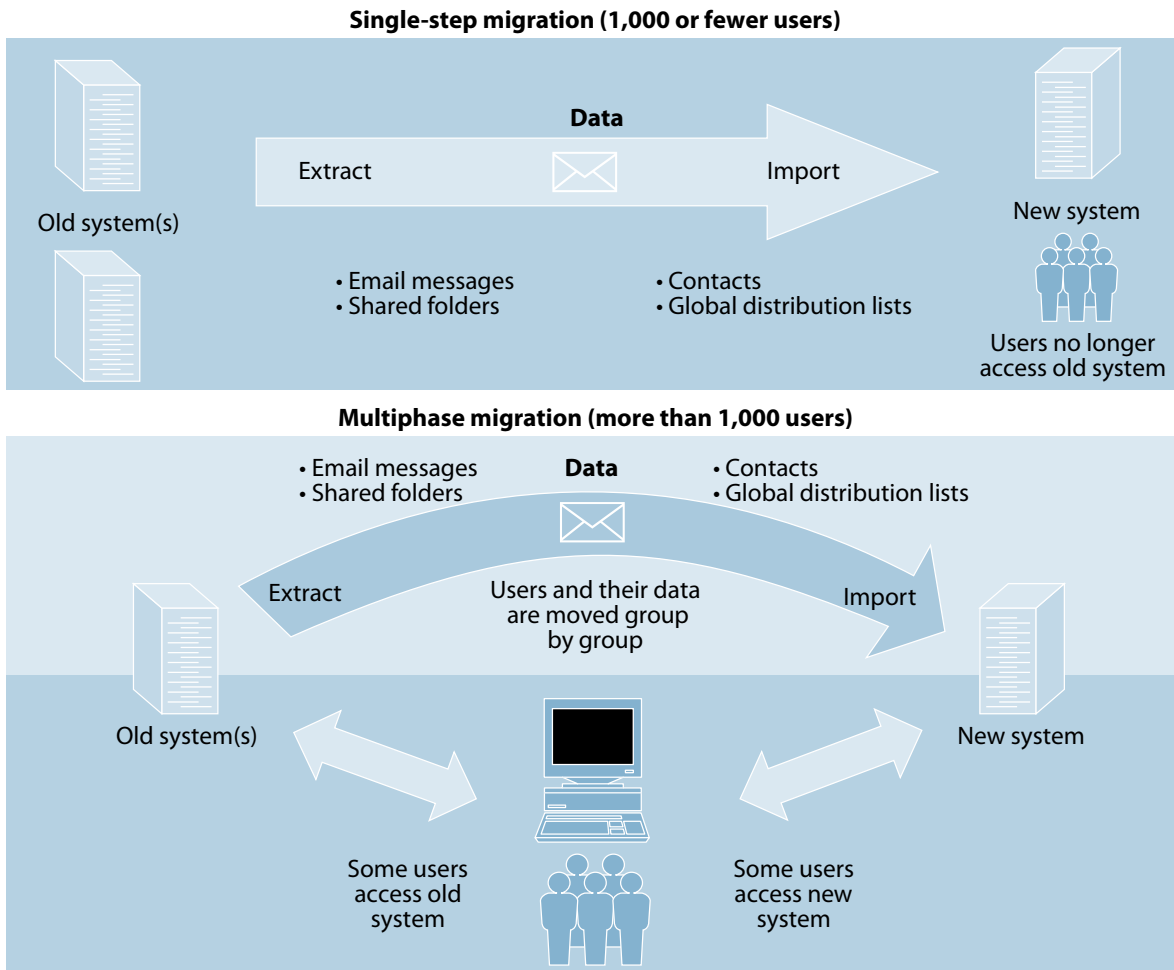
“We had coexistence challenges. We were running connectors between Exchange 5.5, Exchange 2000, and Lotus Notes and they weren’t of production quality. We had problems with mail, calendar, and contacts data getting corrupted.” (Messaging manager, global energy company)

- **Think twice before migrating calendars.** Because of a lack of standards, calendar data does not move perfectly from one system to another, and free/busy lookups may not work properly. Often it is not practical or even possible to migrate calendar data, even in a single-step migration. A common problem spot is recurring events. If you do decide to migrate calendar data, move users over from the old calendar system to the new one in phases, such as by workgroups. Have an administrative assistant maintain both sets of calendaring clients to perform cross-group scheduling. This works better than trying to cut off the use of the old calendaring system all at once.

AVOID THE PITFALLS OF EMAIL MIGRATIONS

Don’t succumb to optimism and underestimate the efforts or costs involved in an email migration project. The biggest pitfalls of email migration projects are:

Figure 4 Choose The Right Migration Option: Single Step Or Multiphase



- **Underestimating.** Underestimating data migration time could result in unplanned downtime. If extended, this downtime could have a negative material effect on the company and could even be career-limiting. Underestimating the horsepower required to keep gateway interconnects up and running under stress, or to power the machines doing the data migration, can also cause delays and downtime. And finally, underestimating user training needs can result in higher-than-expected support costs, low user satisfaction, and lower-than-expected end user adoption rates, especially in the case of integrated team collaboration tools.
- **Underbudgeting.** Underbudgeting mistakes correlate with over-optimism. Cost overruns are often due to unexpected desktop hardware upgrades, personnel time required to touch each desktop (in some cases where the client software is being replaced), database upgrades (for example, Microsoft Windows SharePoint Services is

implemented and requires a SQL Server back end for enterprise-class rollout), network bandwidth upgrades to support remote users after data center consolidation, user training (especially if users must learn new client software), and greater-than-expected need for outside consulting resources.

- **Skipping the prototype.** Not all data will migrate perfectly. Calendar migration is a common sore spot and directory synchronization is difficult to set up and must be tested rigorously.

RECOMMENDATIONS

LEARN FROM OTHERS FOR EMAIL MIGRATION PROJECT SUCCESS

- Use the TEI model to help make the business case to migrate to a new email platform. Compare it against the TEI of delaying a migration.
- Expand the focus of the project from email migration to include message archiving and collaboration.
- Ensure executive sponsorship.
- Use the migration as an opportunity to institute and enforce an improved email policy.
- Don't migrate all the email. A migration offers an opportunity to do some message retention work.
- Standardize your naming scheme. Migration can benefit from having a consistent Internet address naming scheme across the enterprise.
- Hire consultants to help with the project.
- Create a cross-functional architecture team.
- Do a direct cutover whenever possible.
- Implement message archiving software as part of the email migration project or as a tightly linked project. The strategic approach is to implement message archiving software in the context of the overall records management strategy.

SUPPLEMENTAL MATERIAL

Companies Interviewed For This Document

Avanade	Microsoft
CompuSven	Novell
Connectria	Oracle
Hewlett-Packard	Sun Microsystems
IBM	Wingra Technologies

ENDNOTES

¹ Existing Lotus Notes/Domino customers that are committed to IBM should get on the J2EE train and turn to WebSphere Portal as the bridge between Notes/Domino and Lotus Workplace. Midsize and large companies that are new IBM collaboration software customers should bypass Notes/Domino, focusing instead on Lotus Workplace, while recognizing that Lotus Workplace is currently an early-version product family that will require extensive customization to meet most companies' needs. See the February 3, 2004, IdeaByte "Live from Lotusphere 2004: Shift to J2EE Under Way."

² Soon, the collaboration market will no longer be dominated by client/server-based horizontal environments, but by solutions built from collaboration components sharing a common repository that easily integrate with line-of-business applications. See the September 26, 2002, Planning Assumption "Navigating the Contextual Collaboration Market."

³ Convergence between communications and collaboration technologies will radically change the way people communicate in the next decade. With USC, business communications are no longer location-specific, such as office phone, mobile phone, work email address, personal instant messaging address, and workers can prioritize how and in what manner they are contacted. Within five to six years, unified synchronized communications will become recognized as the new standard for effective business communications as up to 33% of Global 2000 firms complete partial rollouts. See the February 24, 2004, Trends "Unified Synchronized Communications Arrives."

⁴ Most large companies go through four phases when it comes to collaboration: 1) traditional collaboration only, 2) experimentation, 3) proliferation of tools, and 4) enterprise strategy and standardization. While the desired state is enterprise strategy and standardization, the majority of large companies are in the throes of experimentation and proliferation. This will remain the predominant trend for several more years; the majority of large companies will not implement enterprise collaboration strategies until 2007. See the February 19, 2004, Quick Take "Stop Experimenting and Develop a Collaboration Strategy."

- ⁵ The TEI model helps answer the question, “What will we get for our money?” The model includes not just the estimated spending over the life of an IT system or initiative, but also an evaluation of potential business benefits, future options and relative risks. Evaluations based solely on cost can, and often will, lead to improper decisions with a questionable impact on organizational goals. See the September 26, 2003, Planning Assumption “The Foundation of Sound Technology Investment: The Total Economic Impact™ Methodology.”
- ⁶ Many of the firms that provide email migration services also provide email outsourcing. The most opportune time to consider outsourcing is when facing a major migration or upgrade. See the January 14, 2004, Planning Assumption “The Rebirth of Email Outsourcing.”
- ⁷ A cross-functional team is established and is led by a manager who is responsible for collaboration. For success, this approach requires leadership by a person who has strong management and team-building skills. See the October 31, 2003, IdeaByte “Create Cross-Functional Team for Collaboration Architecture Decisions.”
- ⁸ While broadcast email enables users to cast a wide net when seeking information or quickly distribute information to large numbers of people, it can also quickly overload a mail server, especially if it contains large attachments. See the December 8, 2003, IdeaByte “Control Broadcast Email via Policy and System Configuration.”
- ⁹ We estimate that 60% to 65% of companies impose total message size limits (the message plus metadata and attachments), and approximately 60% of companies implement mailbox size limits. See the January 28, 2004, IdeaByte “Impose Message and Mailbox Size Limits to Meet E-Mail Service-Level Agreements.”
- ¹⁰ The most feasible way to manage retention and disposition of a subset of corporate e-mail for this length of time is to implement e-mail archiving technology or expand an existing implementation. See the July 14, 2003, IdeaByte “Archive E-Mail for Seven Years Despite Lack of Explicit Mention in Sarbanes-Oxley Act.”
- ¹¹ Despite pressure to make a quick decision regarding a message archiving solution, take the time to step through each stage in Forrester’s framework for records management decisions in order to fend off long-term integration challenges and reduce long-term costs. This framework includes establishing a corporate policy, reviewing the IT strategy and analyzing the existing technology portfolio, selecting a vendor, installing and integrating the software, and managing the ongoing process of capturing, classifying, archiving, reviewing, and destroying records. See the July 10, 2003, Planning Assumption “Records Management Requirements Drive Changes in Enterprise Content Management and Storage Strategies.”

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