Osterman Research
SURVEY REPORT

The Importance of Doing Email Migrations the Right Way

Figures in this Report

Overview

Migrating an organization's email and/or archiving systems to Office 365, Exchange Online, Google G Suite or some other email, collaboration or archiving platform is not an easy thing to accomplish. There are a number of critical decisions to make in advance of migrating to a new platform, and the migration process itself requires careful planning and execution over an extended period in order to avoid data corruption, lost chain-of-custody for sensitive data, and ensuring a minimal impact on employee productivity. There is a sequence of activities that must be scoped, agreed upon, and carried out properly in order for the migration to be successful. Aligned with the activities in the migration process are a range of third-party products and services that can simplify and streamline the migration process, improving the end result, while decreasing the risk of human error during the process.

ABOUT THIS WHITE PAPER

This survey report presents the results of a primary market research survey conducted with members of the Osterman Research survey panel and others during October 2019. The survey was conducted with 129 members of the panel, located primarily in North America.

Here are the key details of the survey:

- Mean number of employees at the organizations surveyed: 24,138 (median was 1,500).

- Mean number of email users at the organizations surveyed: 22,133 (median was 1,400).

ABOUT THE SURVEY

In order to qualify for the survey, organizations had to:

- Have at least 50 employees.

- Have undergone a migration from one vendor's email, collaboration or archive platform to another during the last two years.

- Have a business-justified need to be assured of protecting data/retaining it for long periods (e.g., the organization is in a regulated industry or have a need to retain data for legal purposes.

To download the full white paper, *The Importance of Doing Email Migrations the Right Way*, please click here.

Survey Findings

Figure 1
Current Status of Migrations
Organizations that have not undergone or planning a migration were not included in the survey

We plan to do so during the next 12 months
26%

We have undergone a migration from one vendor's email, collaboration or archive platform to another during the last two years
74%
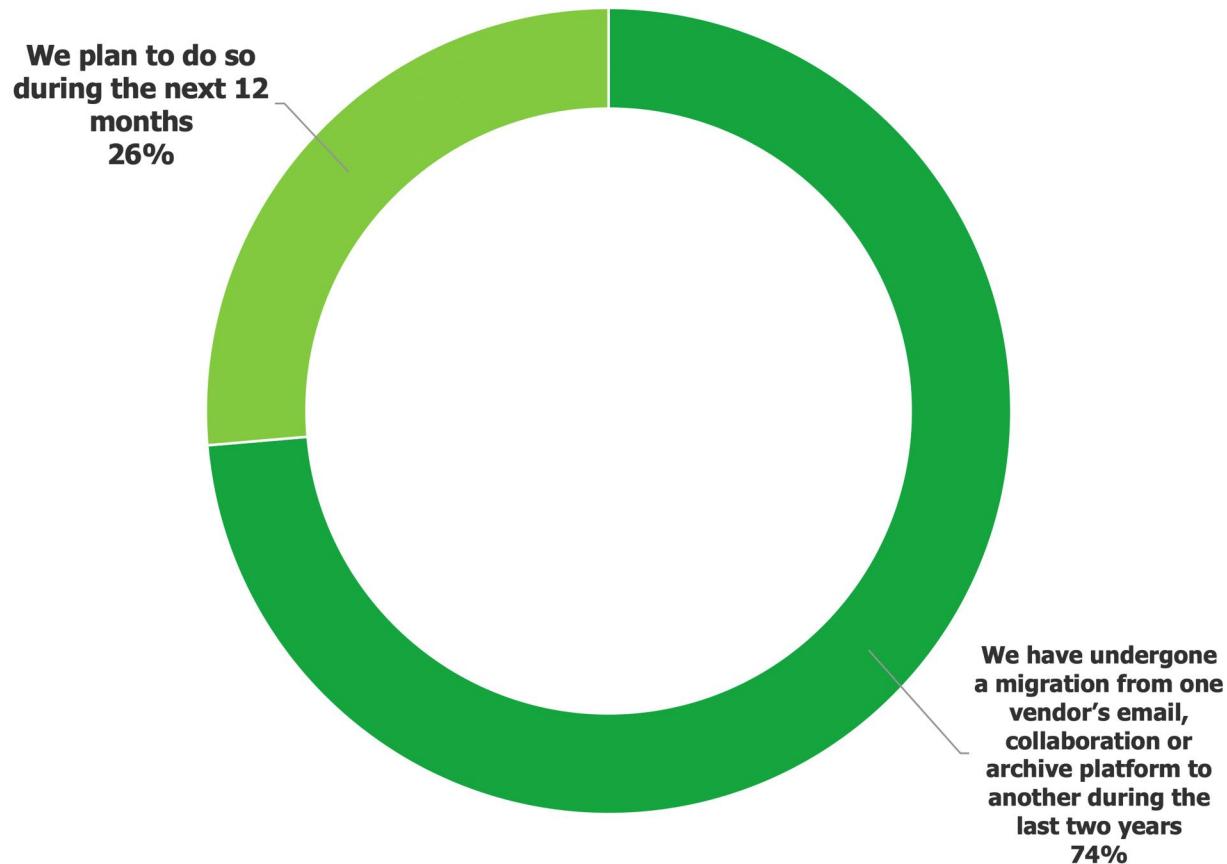
Source: Osterman Research, Inc.

Figure 2
Industries Served by Surveyed Organizations

INDUSTRY	%
Financial services/insurance	26%
Healthcare/pharma	19%
Manufacturing/logistics	14%
Education	9%
Government/public sector	8%
Retail	5%
Military	2%
Technology	2%
Transportation	2%
Energy/utilities	2%
Telecom	2%
Other	10%

Source: Osterman Research, Inc.

Figure 3
Current Status of Office 365 Implementation

| Status	Percentage
It's fully in production	36%
It's fully in production and we're expanding to include new parts of the business	24%
Partially implemented, we're currently migrating	22%
Not yet implemented, but we're in piloting it now	9%
Not yet implemented, but we plan to	5%
Not yet implemented and no plans to do so	3%
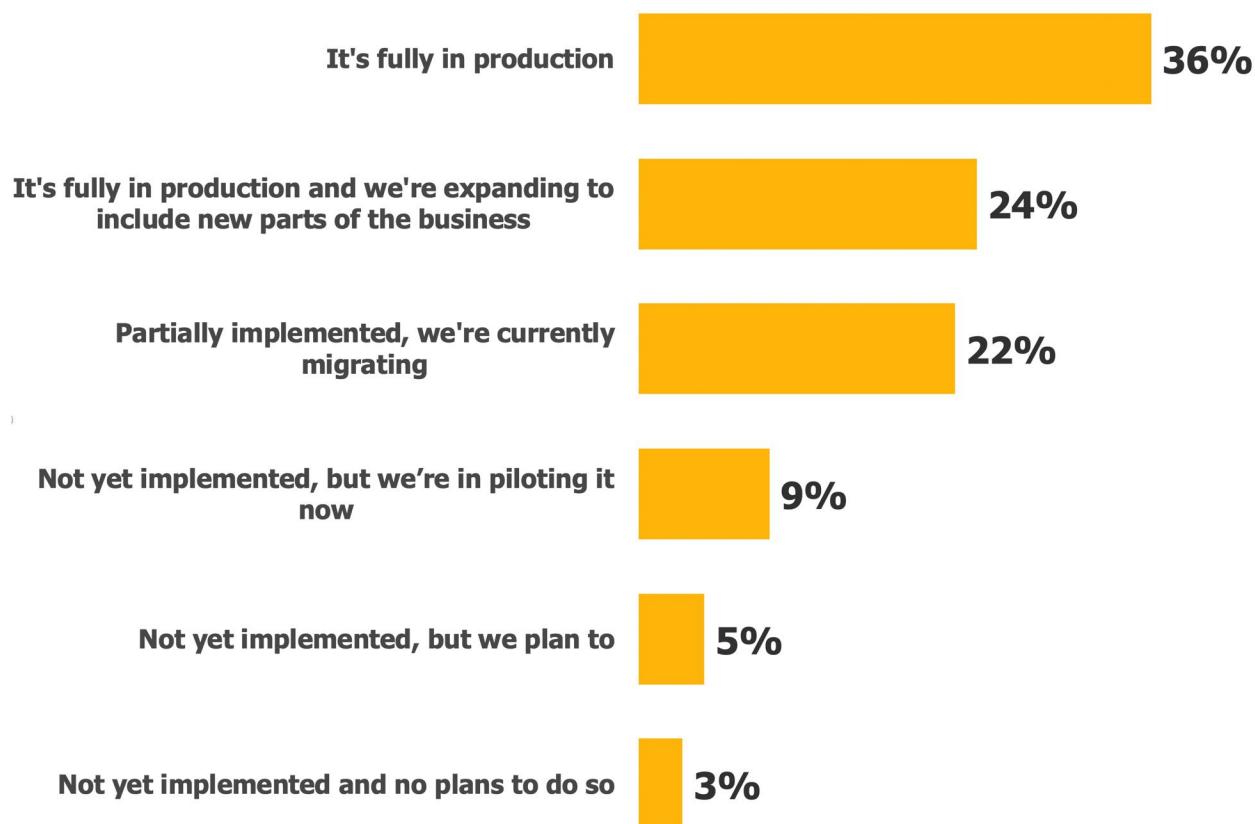
Source: Osterman Research, Inc.

Figure 4
Ultimate Plans for Managing Various Content Sources and Solutions

Content	Only On-Premises	Only in the Cloud	Both
Voice/audio archiving	30%	31%	39%
Inactive records	30%	35%	35%
Communications supervision	20%	40%	40%
Active records	19%	27%	53%
Text message archiving	18%	48%	34%
Trading systems (with message interface archiving)	17%	49%	34%
Instant messaging archiving	15%	50%	34%
Encryption	15%	27%	58%
Collaboration tools	13%	51%	36%
Anti-spam/anti-malware filtering	13%	42%	45%
Disaster recovery/business continuity	13%	19%	69%
Email archiving	12%	42%	46%
Social media content archiving	12%	62%	27%
DLP	12%	32%	56%

Source: Osterman Research, Inc.

Figure 5
Organizations' End Goal for Their Corporate Records Strategy
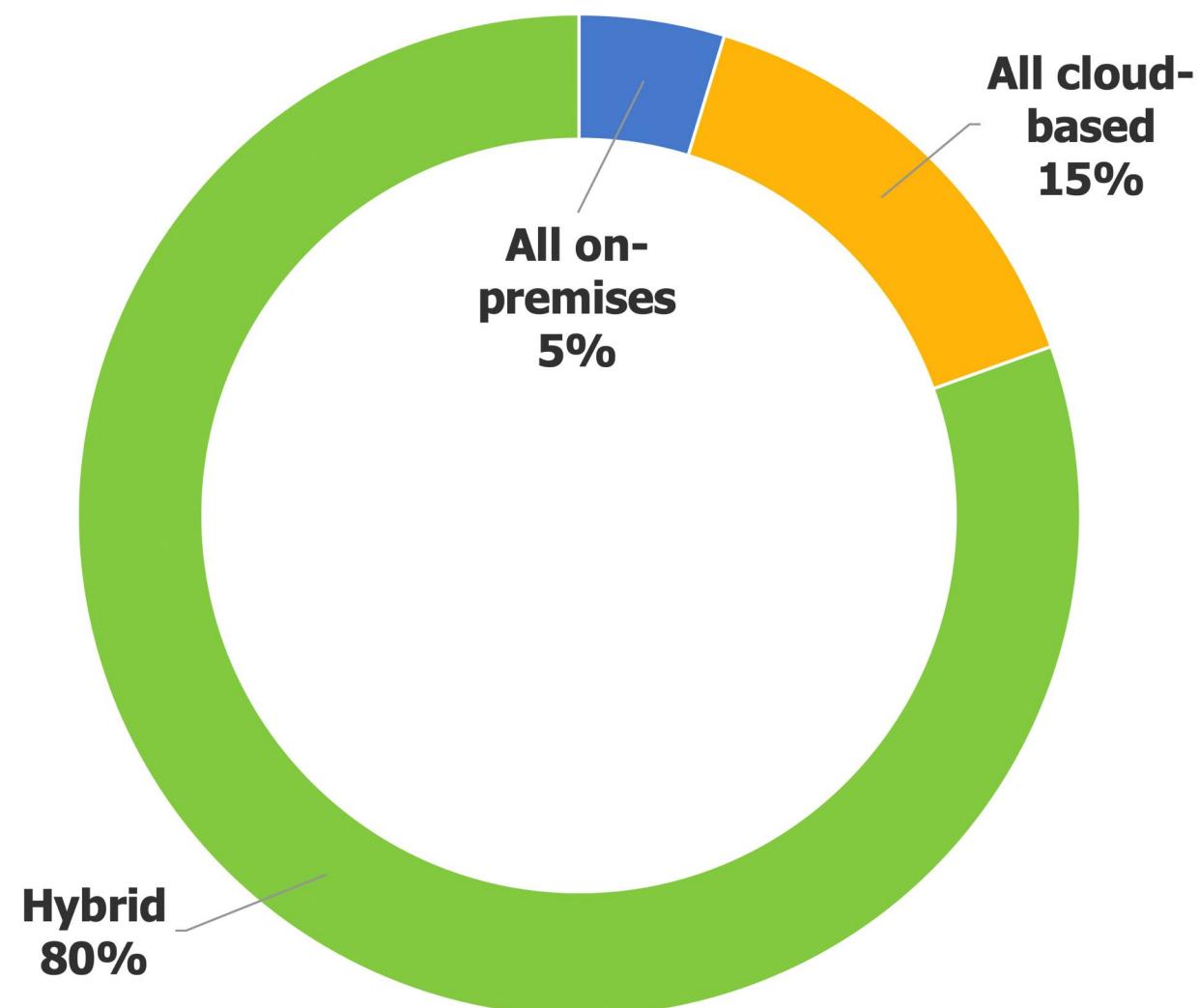
Source: Osterman Research, Inc.

Figure 6
How Organizations Prepared (or How They are Preparing) for Their Recent/Upcoming Major Migration Project

Category	Percentage
Using our internal staff and resources	90%
Using outside consultants	53%
Using a third-party vendor's professional services	37%
Using a third-party vendor	36%
Other	1%
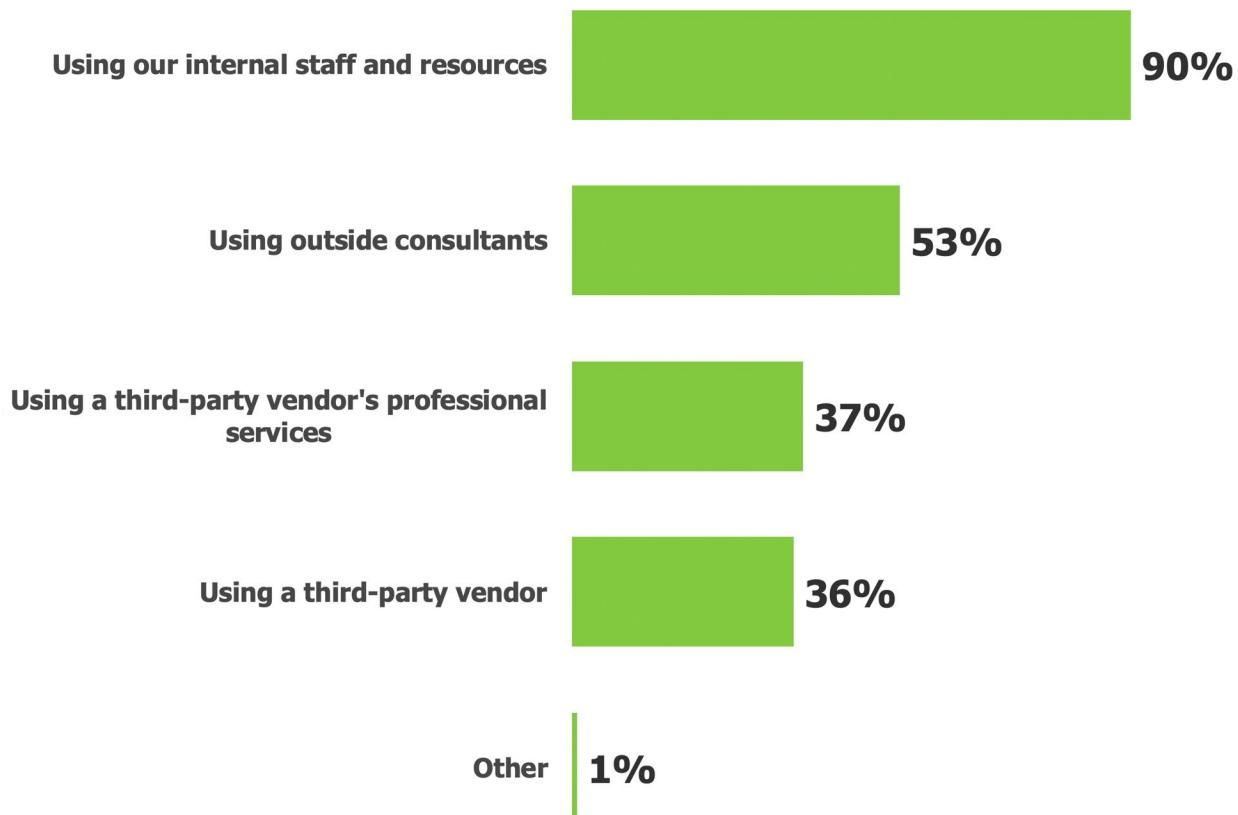
Source: Osterman Research, Inc.

Figure 7
Total Person-Hours Invested in the Organizations' Recent/Upcoming Major Migration Project
Person-hours per employee
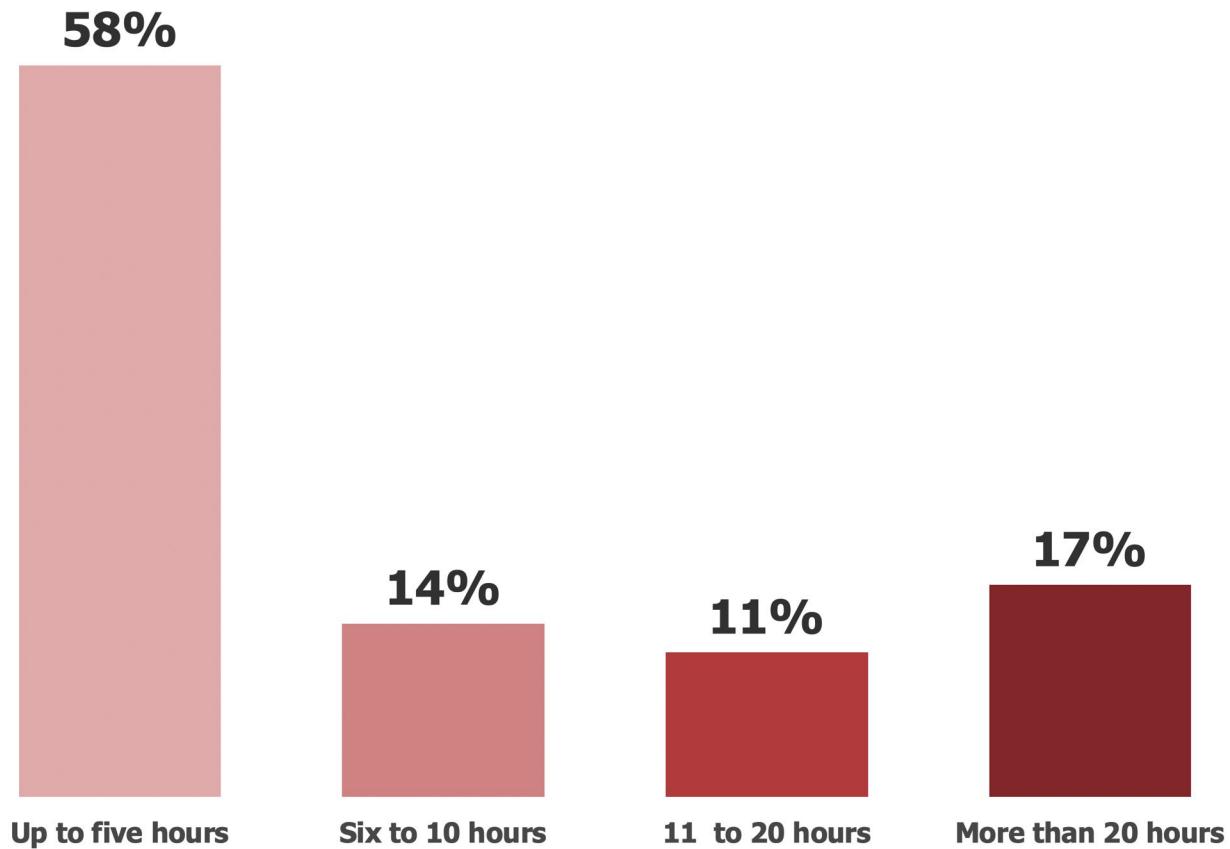
Source: Osterman Research, Inc.

Figure 8
Tools Used for Organizations' Recent/Upcoming Major Migration Project
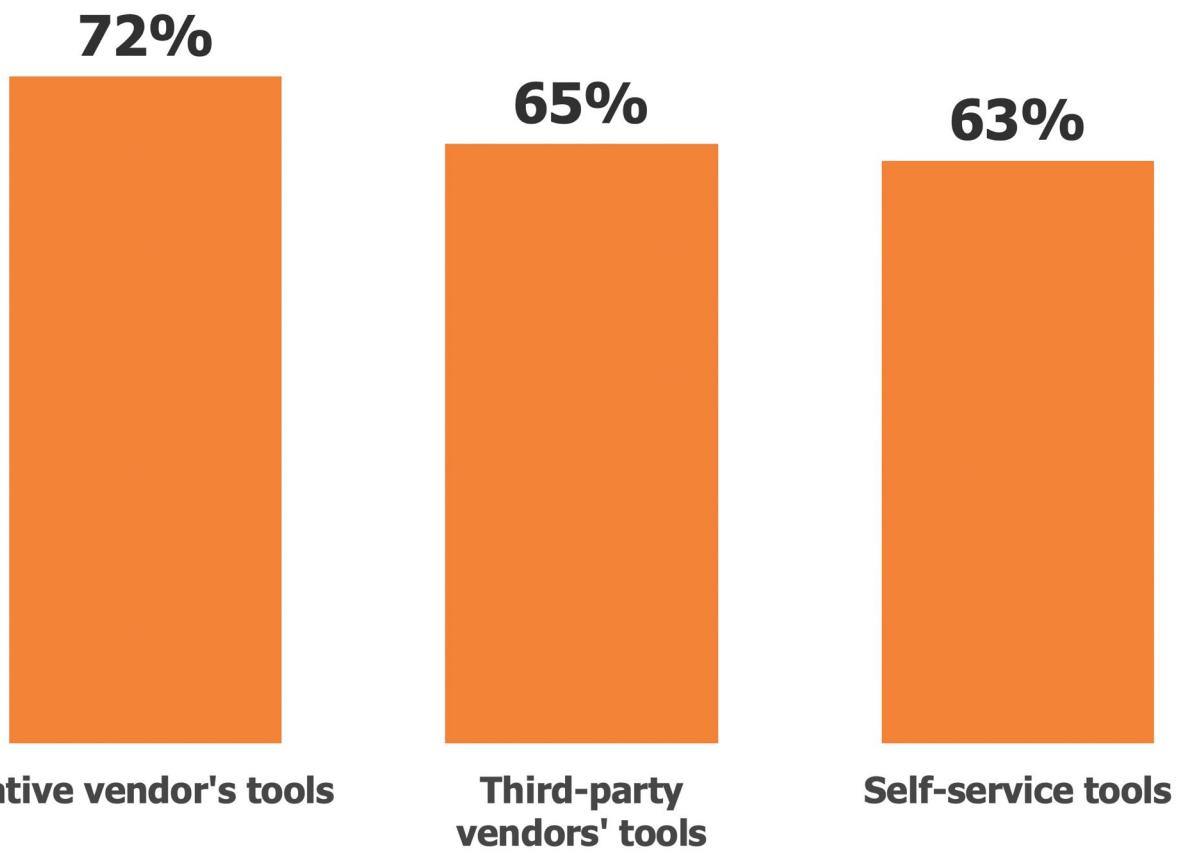
Source: Osterman Research, Inc.

Figure 9
Drivers for the Migration Decision
Percentage responding "important" or "extremely important"

Driver	Percentage
To improve cyber security	60%
Improve organizational communication	56%
Manage corporate records	55%
Drive user productivity	54%
Streamline/reduce the cost of IT operations	53%
Gain certainty over costs	47%
Chain of custody of data	45%
In response to a regulatory mandate	32%
Our experience with our migration vendor	30%
Our migration vendor's method/price	29%

Source: Osterman Research, Inc.

Figure 10
Most Difficult Aspects of the Recent/Upcoming Major Migration Project

Aspect	%
Ensuring all links and access to all shared resources continue to work for all source and target users throughout the duration of the migration	47%
Managing coexistence of email during the migration	37%
Educating users	35%
Supporting users	34%
Pre-migration planning	34%
Configuring the migration solution	28%
Organizing groups to migrate first	28%
Managing multiple email domains during the migration	23%
Tracking the progress of the project	13%

Source: Osterman Research, Inc.

Figure 11
Primary Concerns About the Recent/Upcoming Major Migration Project

Concern	%
Coordinating workloads/co-existence during migration	36%
Project planning/tracking	10%
Budgeting	9%
Timeline	9%
Troubleshooting	7%
Getting business justification to start	6%
Scheduling rollout	6%
Discovery	5%
Retention management	5%
License allocation/management	4%
Legal hold management	3%

Source: Osterman Research, Inc.

Figure 12
Solutions Used (or That Will be Used) in the Recent/Upcoming Major Migration Project
Asked only of organizations whose migration involved Microsoft solutions

Solution	%
Migration of active inbox content from Exchange	71%
Migration of content from PST files	57%
Migration of content from file shares	51%
Migration of content from existing data archives	51%
Discovery of .PST files on our enterprise network	49%
Migration of content from on-premises SharePoint	49%
Migration of active inbox content from other email systems	27%
Migration of content from third-party sync and share services, such as Dropbox, Box, etc.	23%
Migration of active inbox content from Notes/Domino	22%
Other	2%

Source: Osterman Research, Inc.

Figure 13
Types of Content That Were/Will be Migrated

Text	Text
Migration of active inbox content from Exchange	63%
Migration of content from PST files	53%
Migration of content from existing data archives	53%
Migration of content from file shares	48%
Migration of content from on-premises SharePoint	46%
Discovery of .PST files on our enterprise network	41%
Collaboration tool content/archives	37%
Instant messaging content/archives	31%
Phone/voicemail content/archiving	30%
Migration of content from third-party sync and share services, such as Dropbox, Box, etc.	28%
Migration of active inbox content from other email systems	20%
Social media content/archives	18%
Migration of active inbox content from Notes/Domino	17%
Phone SMS/text message archiving	17%
Trading Systems w/message interface archiving	16%
Other	3%

Source: Osterman Research, Inc.

Figure 14
Solutions Implemented to Support Ongoing Use of Office 365
Asked only of organizations that have migrated or will migrate to Office 365

| Solution	%
Service providers/consultants	44%
Spooling of inbound email to provide high availability for Office 365	42%
Email encryption	75%
Email filtering to protect against spam, malware, spear phishing, and other email security threats	77%
Advanced threat-detection capabilities	72%
Apps for computers and mobile devices for accessing content in Office 365	52%
Audio conferencing services for Skype for Business	36%
Microsoft Teams	62%
Creating a compliance archive of email external to Office 365	40%
Advanced data loss protection capabilities	42%
Software for designing and executing automated workflows in Office 365	28%
An eDiscovery solution	40%
Migrating data into SharePoint on-premises	25%
Migrating data into SharePoint online	42%
Unified communication analytics	25%
Records management solution	25%
Other	1%

Source: Osterman Research, Inc.

Figure 15
Types of Content That Organizations Currently Archive

| Content Type	%
Email	91%
Files	81%
Databases	57%
SharePoint data	54%
Collaboration tool content (e.g., Teams, Skype for Business, Zinc, Slack, etc.)	47%
Voicemail messages	45%
Instant messages	39%
Salesforce or other CRM data	36%
Content from Microsoft OneDrive	34%
Official, company-generated Tweets	22%
Data in Dropbox or similar cloud-based systems	21%
Text/SMS messages	20%
Official, company-generated Facebook posts	19%
Content from Google Drive	19%
Official, company-generated Linked-In posts	18%
Employee-generated, personal Facebook posts	12%
Employee-generated, personal Linked-In posts	12%
Employee-generated, personal Tweets	11%

Source: Osterman Research, Inc.

Figure 16
Percentage of Content Archived On-Premises and in the Cloud
2019 and 2021
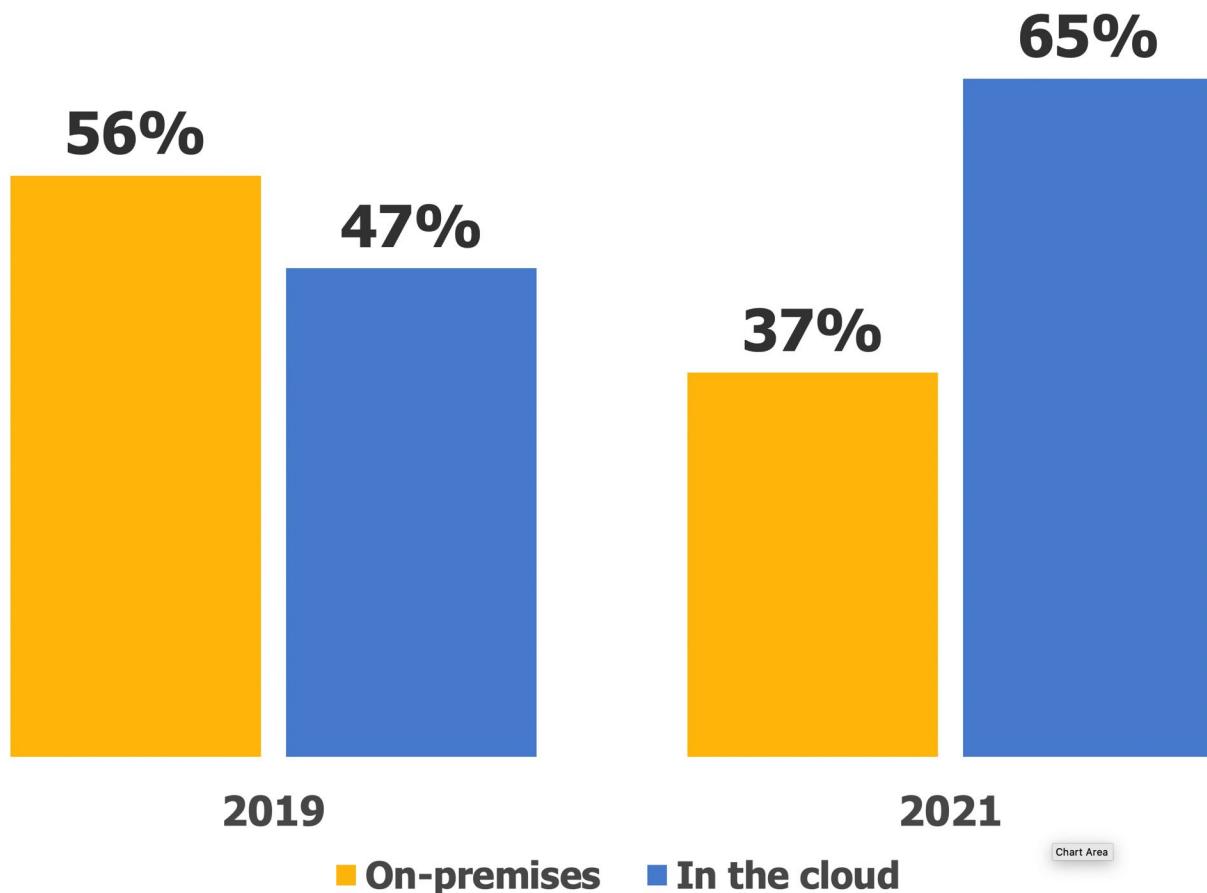
Source: Osterman Research, Inc.

Figure 17
**Years that the Current Archiving Solution Has Been in Place**
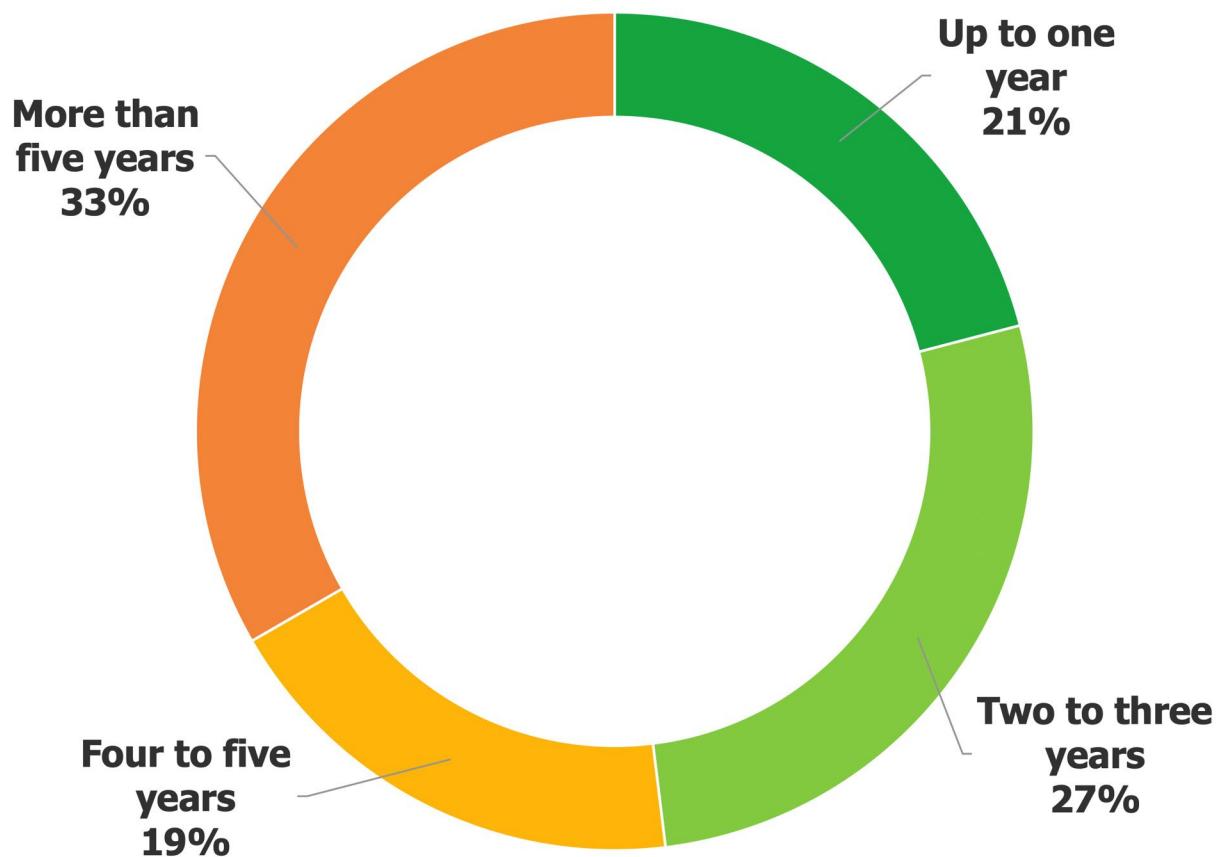
Source: Osterman Research, Inc.

Figure 18
Drivers for Replacing the Current Archiving Solution
Percentage responding a "driver" or "major driver"

Text	Text
Scalability of the system	62%
The ability to establish retention policies	58%
The ability to place legal holds on content	50%
Our organization's cloud strategy	50%
Ongoing cost of storage and maintenance	50%
Speed/accuracy of search for eDiscovery	49%
Want to reduce cost of ownership	49%
The ability to delete content when necessary	45%
Existing technology no longer scales/meets needs	45%
Part of an overall cloud strategy	45%
Speed of search/access for end users	43%
Need improved eDiscovery capability (search/hold)	43%
End-of-life of archiving system	40%
Want better lifecycle management (e.g. managed deletion)	36%
Need better performance (search/access/throughput)	35%
The need to archive new content types	35%
Current archive vendor offers poor support/roadmap	31%
Archive standardization following an acquisition/merger	30%

*Source: Osterman Research, Inc.*

Figure 19
Approaches That Would be Taken if Organizations Were to Migrate to a New Archiving Solution
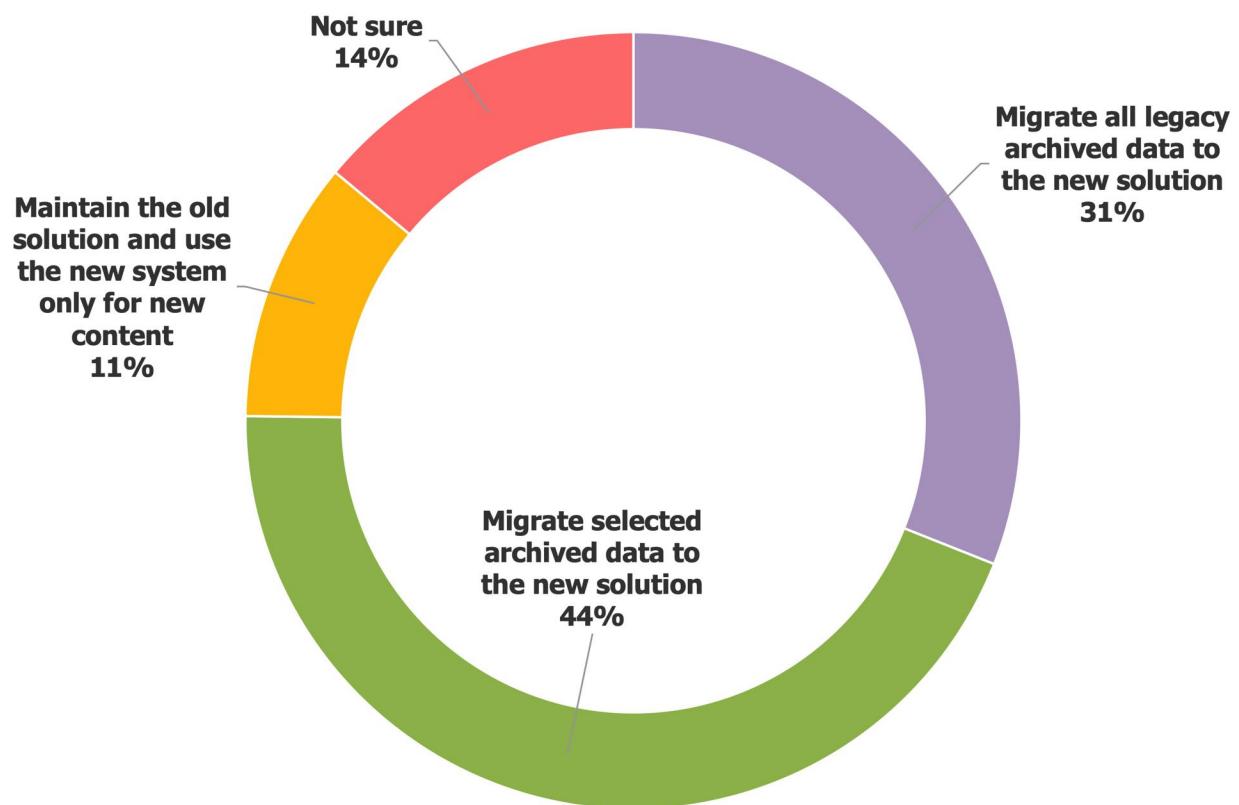
*Source: Osterman Research, Inc.*

Figure 20
"How important is it to coordinate migration of archives with production systems?"
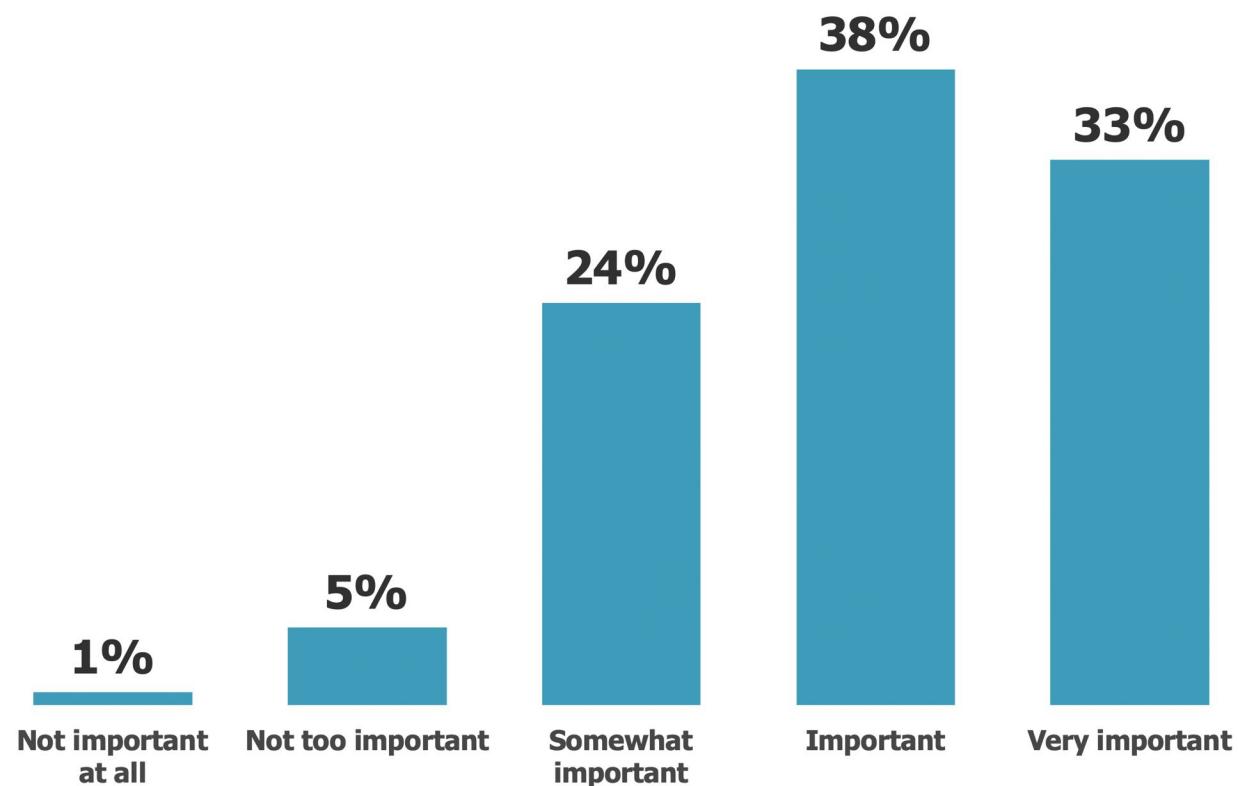
Source: Osterman Research, Inc.

Figure 21
"Regulatory mandates aside, what does your organization do with the data it archives?"

Category	Percentage
Legal hold, eDiscovery and other legal-related searches	66%
We capture and store it for big data analysis, AI/machine-learning and/or data insights	29%
We capture and store it for use in data lakes for reporting	29%
Nothing: we capture, store, expire and delete it	28%
Nothing: we capture and store it forever	18%

Source: Osterman Research, Inc.