

# Six Steps to a Successful Microsoft® Exchange Server 2010 Deployment



Efficient communication is at the heart of every successful business. With e-mail still the most entrenched business communication tool and over a billion business mailboxes in use, it stands to reason that changing or migrating the e-mail platform is one of the most complex and risky projects an IT department can undertake.

Microsoft® Exchange has become the e-mail communications standard for most organisations around the world, with every new version bringing about a raft of new features and functionality available to the IT organisation and end users that address key business requirements such as efficiency, mobility, productivity and compliance.

With the market availability of Microsoft® Exchange Server 2010, many organisations are weighing up the benefits the new version brings against the complexity of deploying and integrating it within the organisation.

Some of the major drivers for moving to Exchange Server 2010 from earlier versions or from a different platform such as Novell® GroupWise® or IBM® Lotus Notes® include:

- A unified communications-ready platform for a broad range of capabilities such as e-mail, presence, voice mail and instant messaging
- The ability to enable users to access various messages from any location on any device 24 x 7
- The need to provide greater Exchange capabilities across multiple mobile devices such as laptops, PDAs, BlackBerrys, etc.
- Enhanced storage designed to make data storage, archiving and retention simpler and faster in order to improve compliance
- Reduced operating and administration costs through role-based administration, web-based management, and user self-service

If an organisation wants to realise the full advantages of Exchange Server 2010, it's important to take a systematic approach that includes a thorough understanding of all of the integration points, dependencies and end user profiles.

“The ability to enable users to **access various messages from any location on any device.**”

### **Step 1:** Define your deployment strategy

The process of deploying Exchange Server 2010 consists of series of milestones and deadlines. It requires in-depth planning and execution. To understand the implications you simply have to imagine the impact that not having e-mail for a week would have on your business.

The starting point for an Exchange project is to define your deployment strategy as this will shape subsequent decisions that will determine the success of the project. A few organisations make the decision to manage the deployment using in-house resources. A successful deployment or migration would be highly dependent on having the right skills, expertise and experience internally to make the project a success.

The most common route is to use a deployment and integration partner to either fully manage the project or to share the responsibility with the in-house team. If you decide to partner, the very first meeting between you and your partner is one of the most important. This is where an understanding of the business's IT ecosystem, its requirements and goals are first discussed and defined. What needs to be understood is how the move to Exchange Server 2010 is going to affect the way your business operates.

By identifying key areas and how a new messaging platform will affect these will help to provide a clearer picture of the scope of the project.

When selecting a partner you need to consider a wide range of factors such as networking skills, desktop deployment knowledge, unified communications and collaboration capabilities and Microsoft® Active Directory experience. All of these areas will be impacted by an Exchange Server 2010 deployment.

### **Step 2:** Assess the IT ecosystem

Before even a plan is developed, it is necessary to obtain a thorough understanding of your organisation's IT environment. It is not uncommon for a corporate IT ecosystem to consist of a heterogeneous mix of technology – servers, workstations, storage, operating systems, and management tools – and often these are scattered throughout the organisation. In the case of a migration from a different messaging platform such as GroupWise or Lotus Notes, issues such as legacy applications, data location, consolidation and conversion, synchronisation, and encryption need to be factored in. Hardware requirements such as servers and storage also need to be addressed.

### **Other critical issues that need to be addressed include:**

- Legacy and third party applications and systems which may need to be migrated or replaced
- Mobility requirements
- Functionality such as fax and voice mail
- Archiving
- Anti-virus

In reality even the most efficient IT departments have a limited view of the entire IT infrastructure. Servers and workstations are often upgraded in a piecemeal fashion; updates and patches are often only deployed in areas deemed critical; mailboxes are added for new users but obsolete ones are often not removed. The problem is compounded the larger the enterprise and more work will be required to assess exactly what IT assets exist and where they are located.

A recommended starting point for assessing your IT ecosystem is to start with an Exchange Deployment Planning Service. This is an interactive consulting engagement structured to address the architecture, design and deployment of Exchange Server 2010. Once a thorough understanding of your company's IT infrastructure is achieved, the project can move into the planning stage.

### Step 3: Planning

Moving to Exchange Server 2010 requires a detailed plan that has been designed to facilitate the deployment from start to finish, with IT, business and end user needs in mind. The plan must recognise all the factors involved and cover all contingencies within a defined timeline. This includes:

- Should you choose a centralised or distributed architecture?
- Should you virtualise your environment? If you do, you will need to consider design, infrastructure, management, storage etc.
- Should you run Exchange as an on-premise, in the cloud or hybrid platform?
- Where should the hardware be located?
- Should mail consolidation be a help desk or user function?
- And what about redundancy, WAN/LAN resources and disaster recovery?

As part of an Exchange Deployment Planning Service you will receive a detailed Exchange deployment roadmap which will help you address specific business and technical considerations. Part of the deployment roadmap will cover the process of locating, unencrypting and converting existing data. If the project involves migration from GroupWise or Lotus Notes to Exchange, a framework for synchronising with Microsoft® Active Directory must be developed. Other areas such as distribution groups, ACLs and delegated rights, mailboxes and signatures, and which tools are required to migrate legacy applications must also be planned for.

The planning stage also needs to look at third party applications. Compatibility, particularly if you are migrating to Exchange Server 2010 from another platform, can become problematic if they are not uncovered and addressed early on.

Unified messaging itself can be a minefield if key areas are ignored. A major consideration is whether to replace existing legacy unified messaging (UM) / voice-mail with Microsoft® Exchange Unified Messaging. There are a number of benefits that can be realised including the consolidation of IT infrastructure, cost savings as well as a number of additional features. However, it can also present a number of challenges associated with network quality of service (QoS), integration into PBX systems (IP or TDM), server locations and network architecture unless addressed during the planning phase. As a UM server cannot currently be virtualised, server capacity and performance is critical to quality of unified messaging and the purchase of gateways or sizing of Session Initiation Protocol (SIP) trunks need to be accurate to handle capacity.

The modular design of Exchange Server 2010 allows you to deploy it easily and build on it as your requirements change. However, it is necessary to get the fundamentals right if you want the roll out to proceed smoothly.

**“There are a number of benefits that can be realised including the consolidation of IT infrastructure, cost savings as well as a number of additional features.”**

### Step 4: Test phase

The testing phase should be treated as a mini-deployment where a small group of your organisation is upgraded to Exchange Server 2010 before the complete migration. It is during this phase that a number of issues can be identified and rectified prior to a full scale deployment.

If you are upgrading from an older version of Exchange, the process is relatively simple. However, a full blown migration often requires on-going tweaks and adjustments before it is all systems go. The test phase usually highlights potential problems and allows you to safely assess the overall impact of the project on your business.

It is important to carefully select the group or business unit for the pilot. Areas to consider are technical know-how, mail volumes, seniority within the organisation, mail usage patterns etc. This will help you select a group that will be able to effectively pilot the deployment and in many cases act as power users once the full deployment is complete.



### Step 5: Training

A move from Exchange Server 2003 or 2007 requires very little additional training for users and a certain amount of skills transfer for administrators. However, if you wish to extract the maximum value from your Exchange project you will need to put a training and education plan in place. There are significant enhancements that have been made to Exchange Server 2010 to improve the end user experience and to enhance the productivity of your organisation. Collaborate with your marketing or communications team to clearly communicate these benefits and garner support for the project from the onset.

### Step 6: Deployment

Executing the plan on a large scale is the next step and one that should go smoothly provided that the initial steps have been successfully completed. There are 3 key steps to a full deployment. Firstly, you need to deploy the back-end infrastructure and ensure that it is successfully running and bedded down. Secondly, you will need to ensure that all users are trained and educated on Exchange 2010. Lastly, is the migration and this has two key areas – the migration of back-end infrastructure and mail routing followed by end user mailbox migration.

A well planned deployment can be executed over a weekend or after hours but expect the preparation for this phase to take several months and even if the planning has been successful, expect some issues to arise. What is important is how those challenges are resolved.

### In conclusion

Your ability as an organisation to communicate is greatly dependent on e-mail. Ensuring that you have an e-mail platform designed to drive efficiency and increase end user productivity with less risk to your business is at the top of the IT organisations agenda.

Moving to Exchange Server 2010 can add great value to your messaging system. However, the importance of planning for your migration is vital to the overall success of a deployment. The initial assessment of the IT environment, planning, testing and training of end users are all areas that have been identified as being critical factors for consideration.

Dimension Data has a wealth of Exchange experience to draw on as well as access to Microsoft's extensive global knowledge base so that lessons learned from other deployments can be applied successfully. Not only can the right partner ensure a relatively problem-free deployment but also provide the training necessary for users and administration staff to achieve the most benefit from the new system.



**MIDDLE EAST & AFRICA**

ALGERIA • ANGOLA  
BOTSWANA • GHANA • KENYA  
MOROCCO • NAMIBIA • NIGERIA  
SAUDI ARABIA • SOUTH AFRICA  
TANZANIA • UGANDA  
UNITED ARAB EMIRATES

**ASIA**

CHINA • HONG KONG  
INDIA • INDONESIA • JAPAN  
KOREA • MALAYSIA  
NEW ZEALAND • PHILIPPINES  
SINGAPORE • TAIWAN  
THAILAND • VIETNAM

**AUSTRALIA**

AUSTRALIAN CAPITAL TERRITORY  
NEW SOUTH WALES • QUEENSLAND  
SOUTH AUSTRALIA • VICTORIA  
WESTERN AUSTRALIA

**EUROPE**

BELGIUM • CZECH REPUBLIC  
FRANCE • GERMANY • HUNGARY  
ITALY • LUXEMBOURG  
NETHERLANDS • SPAIN  
SWITZERLAND • UNITED KINGDOM

**AMERICAS**

BRAZIL • CANADA • CHILE  
MEXICO • UNITED STATES