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**Office 365  
Exchange Onlin  
Planning Questionnaire**

July, 2016



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## 1.0 Introduction

The following questionnaire will assist Cistel in developing the most appropriate deployment plan and strategy to migrate <Client> from its current mail system to Office 365 Exchange Online.

## 2.0 Client Planning Questions

Question	Response
<b>Business Requirements</b>	
What are the business outcomes you are expecting from this project?	
Do you have any regulatory or legal compliance requirements that may impact this project?	
Are there any blackout periods we need to observe or work around?	
Are there any maintenance windows that we need to work within?	
Is there a Change Request (CR) process we need to follow? If so, please provide the process.	
Are there any SLAs we need to maintain during the project?	
Are there any additional business constraints we need to be aware of?	
Do you have a production license key for Office 365?	

Question	Response
<b>Risk Management</b>	
What is your tolerance for email outages during this project?  Internal email unavailable?  Inbound email lost?	
How reliable are your ancillary services (network, ISP, etc.)	
Are there any other risks are you concerned about?	
<b>Current Environment</b>	
Describe the current messaging system (messaging platform, version, architecture, topology).	
Describe the current email backup system and processes.	
Do you have an email queuing service?	
Describe the current archiving system, if any. Will this be required post migration?	
Describe the current journaling system, if any. Will this be required post migration?	
What email access application(s) (names and versions) do you use?	
Do you have appliances that use email (e.g. Multi-function Printer)?	
Do you have any backend applications that use email (websites, monitoring tools, etc.)?	

Question	Response
What software are end users using to access email?	
Do you have any Outlook extensions (e.g. Symantec anti-spam, email classification etc.)?	
Do you have any mail enabled applications (e.g. mail merge, CRM, fax, SMS gateways, etc.)?	
Are PSTs being used? Do they need to be migrated?	
Are you using public folders?	
Are you using resource mailboxes?	
What AD Forest Functional level is in use?	
What AD attributes should be included in DirSync?	
Number of mailboxes	
Largest (Gb)	
Smallest (Gb)	
Average (Gb)	
Describe the current network topology including link type, link speeds and average utilization.	
Are you using email quotas? If so what are they? Do you intend to continue using quotas.	

Question	Response
Do you have an email retention policy? What is it?	
Are you aware that there is no support for backing up deleted message in O365? Is this a concern?	
Any requirement for “legal hold”?	
Are there any external entities that require access to your email system?	
Is there a firewall in place that might prevent connectivity to Exchange Online services?	
Are there any webmail proxy services in place	
Are there any Anti-Virus/Antispam services or appliances in place?	
Is the intention to keep the existing Anti-Virus/Antispam hardware/software in addition to Microsoft Exchange Online Protection?	
What email domain(s) will be migrated? Are additional domains or aliases required?	
<b>Client Management</b>	
Client Communications – Who will coordinate them?	
What user training will be required?	
Who will provide it and when?	

Question	Response
Is the end user expected to update their Outlook profile? Mobile phone profile?	
<b>Migration</b>	
Who controls DNS records (both internal and external)?	
Who is responsible for security certificate generation if required for federation?	
What end user applications will access email post migration?	
Where will the users access email from (location scenarios: office, home, hotel, roaming)?	
What devices, operating system and applications will be supported for email access?	
What is the intended backup strategy?	
How much historical mail will be available/retained in the new system?	