Migrating Your Company's Email From Rackspace to Microsoft 365

Pre-Migration Guide & Checklist

`</>`codepoet

Your 8-Step Guide to a Smooth Email Migration

Introduction

If you were a Rackspace email customer, you probably remember December 2, 2022 well: It was the day a security incident left Hosted Exchange customers without email access. During the ransomware attack, hackers used a security exploit to gain access to Rackspace's email environment. Since then, many customers have decided to migrate to more secure email services.

If your company's email is "stuck" on Rackspace (or any other provider) and you've finally had enough of their email deliverability issues, spoofing nightmares, constant spam, high costs, and subpar customer service, there's a better option: Microsoft 365. You'll get:

- Increased reliability and security

- More features at a lower cost

- A better experience for remote workers (Microsoft 365 provides a more unified experience compared to traditional self-hosted, on-site, or fragmented SaaS email solutions)

- More than just email (Switching to Microsoft 365 also gives your team access to features like Teams, Office Online, One Drive, and more)

This guide will help you migrate your email from Rackspace to Microsoft 365. Alternatively, skip the hard part and let Codepoet handle your next email migration. With us, the migration process is free — you just pay the public per-user fee of whichever Microsoft 365 plan you choose. No extra markups, no hassle. Just secure, reliable service.

For a pain-free experience, contact us today. We'll give you all the details about our free migration service, answer any questions you have, and help you make the best decision for your company's needs.

If you still want to DIY your migration to M365, here's everything you need to know.

8 Steps to a Smooth Email Migration to Microsoft 365

Here's a quick overview of the steps, followed by a detailed walkthrough and worksheet:

1 Set goals

2 Communicate with end users

3 Discovery process

4 Assemble your team and allocate resources

5 Complete essential pre-migration tasks

6 Mange syncing and migration

7 Prepare cutover

8 Follow-up

Step 1: Set Goals

A successful deployment to Microsoft 365 should be systematic, organized, and approached with your organization's goals at top of mind.

Before you dive into an email migration, think about which needs aren't being met and why you want to migrate in the first place. For example, are you (understandably) concerned about future security breaches? Is subpar customer service getting on your last nerve? Have you experienced issues with spam, phishing attacks, and reliability?

What are your goals for this email migration? How will it help the company?
Jot them down in the box below.

Step 2: Communicate With End Users

When email goes down, no matter the time of day or night, end-users tend to react with anything from mild concern to intense terror.

That's why pre-migration communication is critical and should include details about:

- What's happening and why — focus on the benefits and how Microsoft 365 will make their lives easier!

- How long it will take to migrate data.

- When the migration will happen.

- What users can and cannot do while the migration is happening (e.g., send and receive emails, create new calendar events, etc.)

- Who to contact with any questions and concerns (having one point person = streamlined support and fewer headaches.)

Remember, actively engaged end-users lead to better outcomes for Microsoft 365 migrations.

Who will be the point person for questions and concerns?

When will you start notifying end-users about the email migration? Do you need to draft up some emails or schedule any meetings? Jot down notes in the box below.

Step 3: Discovery Process

Some companies like to complete this step before communicating with end-users since the discovery phase plays a major role in your eventual timeline.

Regardless, this step is all about identifying any "gotchas" that can derail the migration. Many organizations have information scattered across teams and departments. In all likelihood, it'll take some time to gather everything you need.

You'll need to track down the following information:

- A list of all domain names that are used for email.

- Information about where the domains are registered.
    - Not all domains are registered with one registrar, and not all domains in use are registered with the same company or can be managed from the same account/log in.

- The identity of the provider responsible for DNS management, which may or may not be the same entity as the domain registrar.

- Access to DNS records for the domains included in the migration.

- List of email addresses, groups, and aliases that are currently in use.
    - Note that many organizations have old emails for former employees that don't need to be included during a migration.

- An inventory of the services and devices that are linked to the current email server.

- An inventory of the services and devices that are linked to the current email server.

- An understanding of how users use their email, including if they use webmail and/or their mobile phones, what devices and methods are most frequently used to access email, and how email is synced (such IMAP or POP3.)

- A list of operating systems used by desktop clients.
  - Note that an organization that uses older operating systems like Windows 7 and/or older mail clients may experience more issues during a migration.

- An understanding of how related services like Contacts and Calendars are used. If users share calendars, note if they heavily rely on these services.

- Familiarity with how your team uses AutoFill vs. Contacts. Many users have stopped saving important contact information because modern mail clients curate AutoFill lists. These lists are great but are often lost during migrations.

- An understanding of how your users rely on email history. Some organizations create new users and don't copy over email history as part of a migration. This enables migrations to be quick but can be disorienting for users that rely on their history for sales or compliance.

- The total user and data count of the information you'll be moving.

- An understanding of any HIPAA, SOX, GDPR, or FERPA requirements you may need to consider.

- An estimate of tech-savvy end-users. Even if you have a single point person helping out, are there any other staff who can be available to answer questions for users during the migration process?

- Current server settings needed to configure a mail client.

This part can take anywhere from 1 - 2 weeks to complete depending on information gathering timelines, the number of users, and the size of the data. Plan accordingly.

Is there anyone else on your team who can help locate all of the above information?

Step 4: Assemble Your Teams & Allocate Resources

Write down answers to the questions below to help organize your email migration task force.

Who needs to be involved, including specific people, departments, and teams? Does the maintenance window need to be scheduled and approved by any higher-ups in the company?

People	Departments	Teams	Approvals?

What company resources are needed to make the migration as seamless as possible? Also note if you'll need to pay overtime to your team since email migrations generally take place after-hours.

Identify a window where you can successfully migrate all email data. This should be a time where no or limited email access will be acceptable to users.

Date:
Time:

Are there any users or departments that can't have a lot of downtime?

(Consider migrating VIPs first so they're least affected, and keep in mind that they may need additional support to talk
them through the process. You might also allocate specific technical resources, like a dedicated helpdesk, for VIPs.
Another option is to utilize an email caching service for people or departments who can't accommodate the
possibility of downtime.)

Step 5: Complete These Essential Pre-Migration Tasks

- Create a Rackspace admin account and give it "Full Access" permission to all mailboxes.

- Make sure no data is left behind. This includes:
  - ○ Drafts
  - ○ AutoComplete Contacts
  - ○ Notes
  - ○ Shared Calendars

- Navigate to the control panel and locate the server where your Rackspace emails are hosted. Take note of the server's address — you'll need it to connect with the Exchange Server.

- Choose your Microsoft 365 plan and create the organization.

- Navigate to the admin portal and add your business's domain to Microsoft 365. **DO NOT** edit MX records at this time. Changing MX records will change mail flow and doing so before the scheduled cutover will result in email disruption. The cutover date/time is when the MX and auto-discover records are changed.
  - ○ Set the default domain
  - ○ Add licenses
  - ○ Import or create users
  - ○ Create groups
  - ○ Assign aliases
  - ○ Assign group memberships

Step 6: Manage Syncing & Migration

The smoothest migrations involve syncing mailboxes.

Importing emails and folder structures directly from the existing email server minimizes cutover time and creates a simpler experience for end-users. Syncing mailboxes will require a few additional steps beyond the base Microsoft 365 configuration steps:

- Create sync batch CSVs. Syncing mailboxes requires knowing or resetting the existing email password.

- Create a Migration Endpoint in PowerShell or the web GUI to sync the servers. To do this, you'll need to:

- Identify the DNS record of the Exchange Server for your Microsoft 365 accounts.
- Connect it with the Rackspace server.
- Once the two servers are synced, start the Rackspace to Microsoft 365 migration.

- Run the migration. Consider running it in batches if you have large amounts of data — this will help you avoid overloading your servers and prevent bandwidth throttling from Microsoft.

Step 7: Perform Cutover

This part of the process will involve the most people. Typically, end-users can perform the required steps when they're provided with appropriate documentation in advance (that's why the communication part of the process is so important.)

The exact steps involved in the cutover process will vary based on several factors, like what mail client and operating system were being used by end-users, mail history, and where contacts and calendars are being kept.

- Have users create a local backup of their mail, contacts, and calendars. Ask them to close out any mail clients before EOD.

- Enable users on Microsoft 365:
  - Create accounts for each Microsoft 365 user and reset the passwords. For large organizations, consider using PowerShell to automate this part of the process.

- Once the Rackspace and Microsoft 365 mailboxes of all your users are synced up, update the DNS records to repoint mail flow to Microsoft 365.

- Once DNS records are updated, sync the mailboxes with a new batch to migrate any items that were missed.

- Delete the batches and disable the old Rackspace accounts.

- Have users create a new mail profile in their mail client and add their new Microsoft 365 email credentials.

- If needed, have users restore services such as contacts, calendars, etc.

Step 8: Follow-Up

This is your chance to catch any issues that may have occurred during the migration and cutover. During follow-up, confirm:

- All users have access to their emails Users are not missing emails, contacts, or calendars

- User group membership is correct for any group or department-specific email addresses

- Email deliverability from external email domains

- Spam rules are configured properly

- The previous email service has been properly canceled

- User satisfaction — don't forget to check-in and see how everyone feels about their new email service.

That last step is more important than many IT teams realize. Making sure that end-users are happy with their new email service isn't just a nicety… it also helps prevent any time-consuming issues down the road.

There's an easier way to migrate your email: Codepoet

Migrating off of Rackspace and into Microsoft 365 can be a fairly straightforward process… in *theory*. In reality, it's never that easy. You can generally expect roadblocks, headaches, and unforeseen issues.

Rackspace may not make it easy to migrate your email, but Codepoet does.

The top benefits of enlisting Codepoet handle your company's next email migration include:

Lower costs. Rackspace charges customers if they want to migrate to a different email service. We don't. With us, the migration process is free — you simply pay the public per-user fee of whichever Microsoft 365 plan you choose. We don't add any markups.

Custom-planned email migrations. This checklist gives DIYers a great guide to follow. But, the truth is that business is unique, and so is every migration. We custom-plan every email migration based on the organization's users and their needs.

Top-notch support. We encourage customers to reach out with any and all questions or concerns. Our quick response times might even make you feel like you're our only customer.

We know email is important. Email is a critical part of every business's operations. Our process is designed to be timely and seamless to minimize disruptions and downtime.

"I have worked with Codepoet for almost 14 years. Top notch, quick as well as in depth projects. From full-blown, secure ecommerce to advertising, you will not be disappointed. Extreme attention to detail and in tune with our needs. Our first call will always be to this outstanding group of absolute professionals. Always delivering perfection!"

- Justin Schaffner, IT Director, Parks Coffee

If you're ready to migrate from Rackspace to Microsoft 365, let's talk.

We offer free consultations to answer your questions and provide suggestions based on your organization's technology needs — fill out this quick form and we'll be in touch.