ConversationalGeek®

Conversational Microsoft 365 Mailbox Migrations

By J. Peter Bruzzese (9-time Microsoft MVP)

9th Edition

In this book, you will learn:

- Planning your mailbox migration
- Mailbox migration methods and the data that can be moved
- How to go about a migration in the context of a hybrid environment

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CodeTwo is a leading worldwide provider of enterprise solutions for Microsoft 365 and Exchange that meet ISO 27001 & 27018 compliance requirements. Their applications aid group-work and email administration by streamlining tasks such as: email signature and branding management, mailbox migrations, data backups, and control over mail flow and content.

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Conversational Microsoft 365 Mailbox Migrations

By J. Peter Bruzzese

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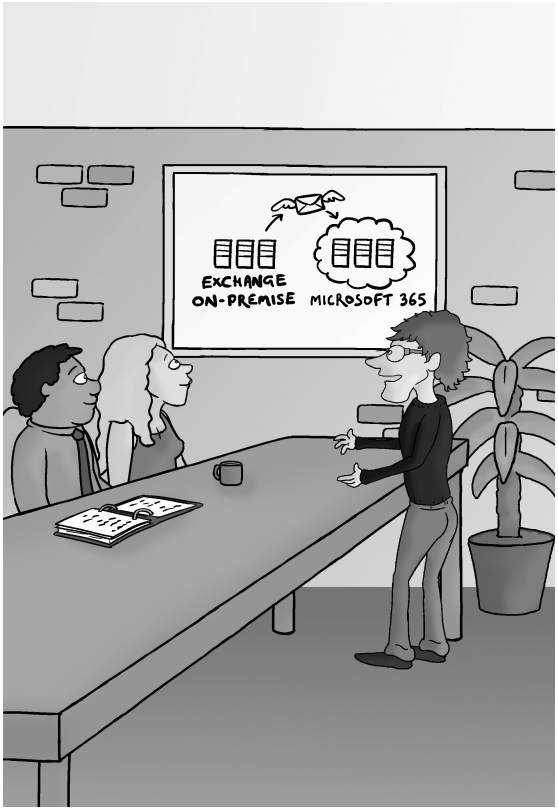

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All of the folks responsible for the creation of this guide:

Author:	J. Peter Bruzzese
Project/Copy Editor:	Ian Whiteling
Content Reviewer(s):	Jacek Szafran
	Nick Cavalancia

Note from the Author

I've been working with Exchange for well over 20 years, and I've historically enjoyed seeing the product evolve with each new on-premises release. Microsoft 365 represents the opportunity for organizations to have Exchange, SharePoint, Teams, OneDrive, and *yes*, even Copilot, all in one administrative console without all the stress of hardware infrastructure, installation, management, and so forth.

Maybe you've made the decision to move to Microsoft 365. Maybe that decision has been made *for* you by others within your organization or as a result of an increased hybrid workforce. No matter the catalyst, the task is before you and you have to figure out how you're going to make that happen. Are you going to move all mailboxes and data directly to Microsoft 365 in one weekend migration? Is that even possible for your organization? Or will you be setting up a hybrid environment so that you can move your mailboxes over in batches? Do you have legacy data you need to worry about retaining on-premises or moving to the cloud? These are the questions you need to be asking and answering first.

The migration of mailboxes to Microsoft 365 isn't "easy" by any means. However, it can be made easier with proper understanding of what is provided to you by Microsoft and where you might seek assistance from outside, third-party sources. This book will help to outline terminology, concepts, and potential solutions.

J. Peter Bruzzese

Migrating Mailboxes to Microsoft 365

Wait… did you just email to ask how it's going?
Seriously?! I'm like… right here J.!

Have you ever moved before? The stress of moving your belongings from one home to another, especially one that is far away (we're not just talking about an around-the-corner move) can be overwhelming. And if you have lived in your current residence for any length of time, it becomes even more difficult deciding what to take with you and how to make it happen.

Migrating mailboxes (including emails, calendars, contacts, etc.) from your on-premises Exchange environment to Microsoft 365 or between Microsoft 365 tenants can have similar levels of stress attached – so much so that some organizations have

simply decided to stick with their on-premises environment for as long as Microsoft will support it.

If you're still running on-premises Exchange 2016, or 2019, Microsoft is still supporting these versions to varying degrees, giving you time to decide, plan, and execute a migration. And if you're running an earlier unsupported version, because of the lack of security patching alone, it's recommended that you, at the very least, upgrade to a supported version (which includes a shifting set of Exchange versions that are supported by Microsoft's Transport Enforcement System) – if not, follow through with the intent to eventually migrate to Microsoft 365.

A new version of on-premises Exchange, Exchange Server Subscription Edition, is expected Q3 2025. The biggest changes to this version will be the subscription-based licensing and no support for coexistence with earlier versions. You can read more about Exchange Server SE at goto.cg/3LUVv77.

Microsoft provides an updated support matrix for all the current versions of Exchange at goto.cg/3yIp2KW.

And if your organization is already on Microsoft 365, your only issue likely revolves around consolidating tenants – something only available to Enterprise Agreement customers that have 500 users or more.

Regardless of which flavor of Exchange (on-premises or within Microsoft 365) you're using, you're reading this eBook because the data that your company has accumulated over the years within mailboxes and public folders now needs to be moved into a Microsoft 365 tenant.

How is that really going to work?

The first step is (of course) coming up with a migration plan.

Planning Your Migration

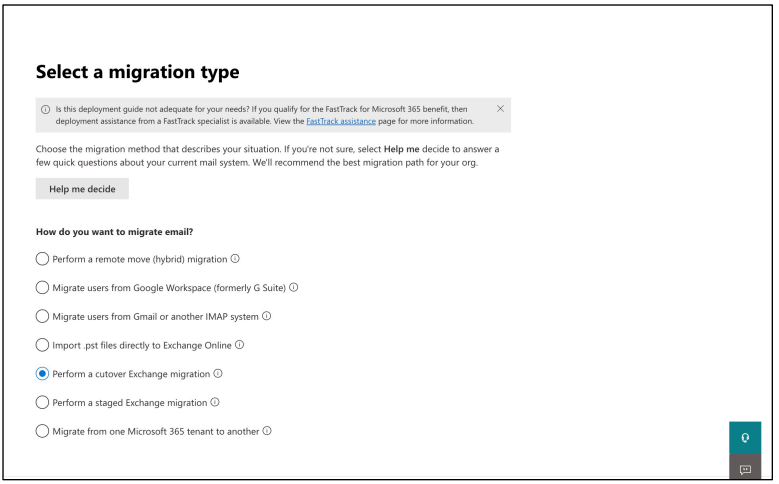
You probably think that once you have an idea of where you're at (read: *Exchange on-premises* or *within a source Microsoft 365 tenant*) and where you're going (again, read: *Microsoft 365*), choosing your migration path is somewhat easy. But is it as simple as going from point *A* to point *B*? *Not so much*.

For those organizations wanting expert guidance delivered by Microsoft themselves, you may wish to check out Microsoft FastTrack for assistance in migrating to and adopting Microsoft 365.

goto.cg/42viehb

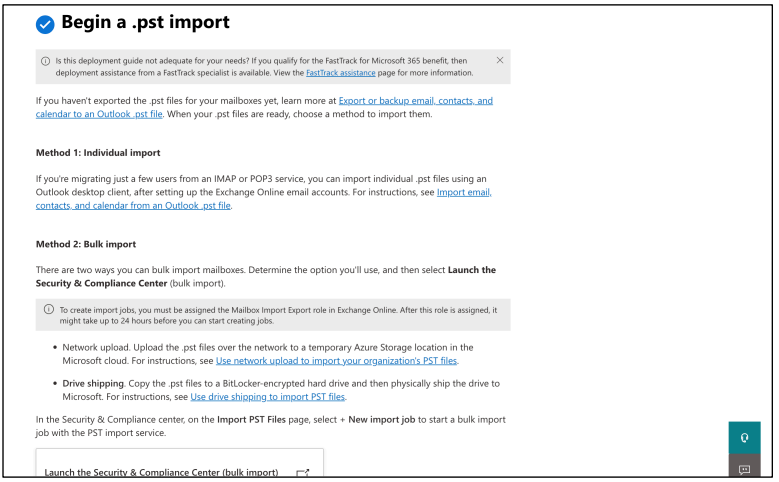
There are tools to help you plan for the tasks you're looking to perform. For example, there is the Mail Migration Advisor. It's best to read a little about it before using it. Learn more from Microsoft at goto.cg/3LGah2N.

There is a link in the first paragraph of the Mail Migration Advisor article that takes you to the actual advisor, which allows you to choose how you want to migrate your email accounts (with Google Workspace, IMAP email, PST files, Exchange, or another Microsoft 365 tenant as sources).



Migration Types within the Mail Migration Advisor

The result of your choice is a basic plan with guidance on how to get started, providing step-by-step guidance for moving mailboxes from your current system to Exchange Online using the built-in tools – for example the PST files example below.



Migration advice within the Mail Migration Advisor

Since our primary topic focus here is *mailbox migration*, those of you migrating from Exchange on-prem would pick either the *Perform a cutover Exchange migration* or the *Perform a staged Exchange migration* option – you'll be pointed to the Exchange admin center's Migration tool to assist with getting all the on-premises email into Microsoft 365 through a process called *data ingestion*.

(Those of you performing a Microsoft 365 tenant-to-tenant migration would select *Migrate one Microsoft 365 tenant to another* and will probably want to skip to the section below entitled *Microsoft 365 Tenant Migrations*.)

Data Ingestion into Microsoft 365

Data ingestion sounds like something you need to go to the doctor for because over-the-counter stuff just isn't helping enough. The fact is that while some start-up greenfield business cases may allow for the creation of brand spanking new mailboxes in the cloud, most folks are going to be migrating *from* something (typically Exchange on-premises, but possibly Lotus / HCL Notes or another hosted/cloud-based solution like Google Workspace) – and so, the data residing in that on-prem platform needs to be "ingested" into Exchange Online within Microsoft 365 to reflect the current state of the business and its email.

How you proceed with that migration will depend on how many mailboxes you have to migrate and what kind of solution will work best for you. You may also have a legacy archive solution on-premises that you are looking to migrate, either over to Microsoft 365 or to some other cloud-based archive solution. All of this is part of the "conversation" around Microsoft 365, so it would be good for you to grasp the concepts.

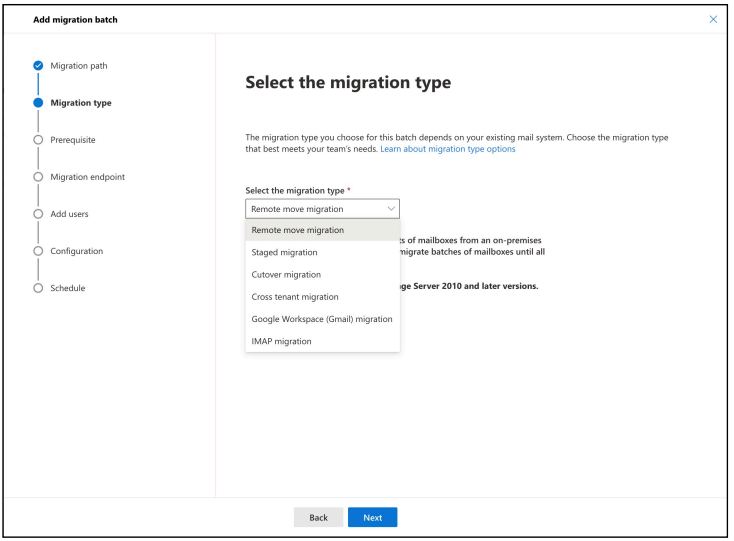
For starters, you need to consider the type of migration it will be necessary to make and how you would like to accomplish the goal. For some, the built-in tools from Microsoft may be your

approach. For others, a third-party solution would make your migration easier.

To begin making decisions on what you'll need/want to do, first look at which platform of Exchange (or alternative on-premises email solution) you're using. Then consider the number of mailboxes you wish to move to the cloud and the amount of data, typically per mailbox (easier to work with if you have been using quotas). Decide if you wish to move all mailboxes to Microsoft 365 or wish to maintain an on-premises/cloud hybrid mixture.

Migrating via the Exchange admin center

If you have a Microsoft 365 portal, look into the Exchange admin center for your organization and explore the Migration tab, found in the navigation pane to create *migration batches*. This migration wizard supports moving email accounts from Exchange 2003 and later versions, depending on the type of migration (more on this in a moment).



Migration types within the Exchange admin center

Types include:

- Remote move migration – This requires a hybrid configuration between your on-premises Exchange and Microsoft 365. The hybrid approach is the only Microsoft solution that offers an "exit strategy" to migrate back. This migration type supports Exchange versions 2010 and later.

- Staged migration – You can migrate batches of mailboxes until all are moved to the cloud. User identity is still managed through your on-premises organization. This migration type supports Exchange versions 2003 and 2007.

- Cutover migration – Use of this option is permitted only if you have fewer than 2,000 mailboxes. If you have more than 2,000 mailboxes, you must use either staged migration (supported on Exchange 2003 and 2007) or remote migration (supported on Exchange 2010 or later).

Microsoft says, "Even though cutover migration supports moving up to 2000 mailboxes, due to the length of time it takes to create and migrate 2000 users, it is more reasonable to migrate 150 users or less."

- IMAP migration – For those of you folks looking to migrate from Yahoo and so on, this migration type is only capable of migrating email; no contacts, calendar items, or tasks (supported by both Exchange and other IMAP-based email systems).

- Google Workspace (Gmail) migration – This migration type copies the contents of user mailboxes from a Google Workspace (formerly G Suite) organization to

Exchange Online. You can migrate batches until all mailboxes are migrated.

Microsoft 365 Tenant Migrations

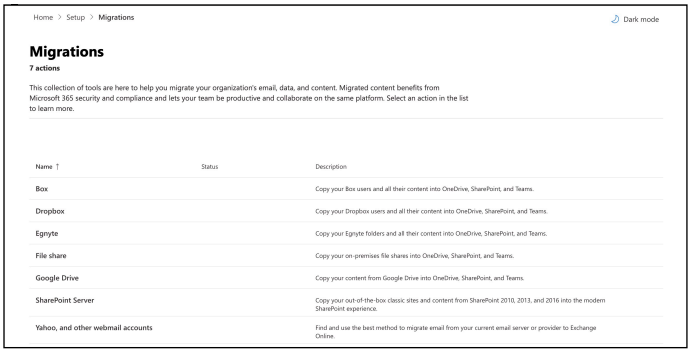
Those of you already running Microsoft 365 will either be selecting *Migrate one Microsoft 365 tenant to another* from the Mail Migration Advisor or the *Cross tenant migration* option from within the Exchange admin center. Both options are designed to assist with moving mailboxes from one Microsoft 365 tenant to another.

Organizations wishing to perform a cross-tenant migration need to purchase a Cross Tenant User Data Migration add-on license per user. There are a number of steps involved, including creating a migration data CSV, identifying source and target tenant IDs, creating a migration application within the target Entra environment, granting API permissions, and a bunch more configuration work on both the source and target tenants. You can read more on how to do this over at CodeTwo at goto.cg/3ymY7aS.

And if you don't meet the EA and 500+ user requirements, Microsoft recommends third-party solutions and/or using a Microsoft solution provider.

Moving Other Types of Data into Microsoft 365

Because Microsoft realizes you don't have email operating in a void, you may want to migrate other types of data from a variety of sources. Within the Microsoft 365 admin center, you can select Setup and then Migrations to use native tools to migrate file data from a number of solutions.



Data and content migration within the Microsoft 365 admin center

Note that the choice to migrate webmail accounts simply takes you back to the Migration batches option within the Exchange admin center.

Hybrid On-Premises/Microsoft 365

For those of you who still want to have part of your Exchange environment remain on-premises, there is an ability to choose a hybrid configuration.

A hybrid Exchange environment allows you to take two Exchange organizations – your on-premises Exchange and your Exchange Online – and make them appear as if they are one Exchange organization. *They aren't*… but they look and act like one to the end-users, and you can use a hybrid to migrate mailboxes at a slow(er) pace and maintain coexistence long-term.

A hybrid deployment provides a variety of features, including:

- A shared domain space (such as companyname.com)
- A unified global address list (GAL)
- Free/busy calendar sharing

- At-will onboarding and offboarding between the two platforms (note that bandwidth and throttling affect the speed of these processes)

- Centralized mailbox management through a single console (the Exchange Admin Center from on-premises Exchange)

Some call it the best of both worlds; the organization can keep mailboxes that are of a more sensitive nature in-house while allowing Microsoft 365 to handle non-critical mailboxes (like temporary workers perhaps). Or they can use the archive features and/or cross-premises e-discovery features of Microsoft 365 combined with on-premises mailboxes.

Configuring Hybrid

It's not necessarily an easy process to set up and configure the hybrid environment. It starts with dropping in an Exchange 2016 or 2019 system into your environment. Once the 2016/2019 system is in play, you can run the Hybrid Configuration Wizard (HCW) from it.

In theory, you can go hybrid with an Exchange 2010 environment, but it's a more difficult process, and the reality is that Microsoft has ended support of 2010. The recommendation is to install 2016 into the environment and remove your 2010 servers. Here are some best practices to go along with this migration path:

goto.cg/3JWANnn

Keep in mind, *this is not a "hybrid server,"* it's just an Exchange server in your organization that will perform hybrid tasks. The HCW can detect and license your on-premises Exchange 2016 hybrid server for free without going to a separate site or calling for support. However, this does not apply to Exchange 2019 hybrid server.

Hybrid Configuration Flavors

The latest Microsoft 365 Hybrid Configuration Wizard (HCW) is available here: goto.cg/3JWTk2Q

The HCW supports a Classic Topology (minimal/express/full), and a Modern Topology (minimal and full) with differences between them. There is a full table available for how the features and options vary between them at goto.cg/3JCrrLY with the basic delineation being:

- Full – Use for larger organizations with a lot of mailboxes (thousands) with a need for complete integration between Exchange on-premises and Microsoft 365. AD is synchronized along with free/busy information and more.

- Minimal – Better for medium organizations with a few hundred mailboxes or where it's going to be a quicker migration (weeks or a couple of months, not many months). AD synchronization works but other features like free/busy doesn't work.

- Express – Best for small organizations that can get the migration done in days/weeks. Does a one-time AD sync and that's it.

Obviously, if you're reading this and you know the size of your environment (and we'd hope you do) then focus in on one of these types of hybrid flavors to research and drill down a bit more into what they do and how.

Hybrid Configuration 101

There are prerequisites you need to consider and handle first. Search Microsoft documentation for the latest "Hybrid deployment prerequisites" before running the HCW.

The prerequisites for setting up a hybrid environment vary but include Active Directory synchronization through the *Entra Connect* (formerly *Azure Active Directory Connect*) tool. This prerequisite helps keep your on-premises Active Directory and Microsoft 365's directory (Entra ID) in sync. It includes password synchronization, pass-through authentication, federation integration, synchronization, and health monitoring (through Entra Connect Health).

Note: The predecessors to Entra Connect are AAD Connect, DirSync, and Azure AD Sync.

Another option (although not a prerequisite) you might want is single sign-on (SSO) so that users can access on-premises and online features with the same username and password through password hash synchronization (aka the synchronized identity model) and/or Active Directory Federation Services (ADFS) or a third-party (aka the federated identity model).

Both options allow users to log in with the same credentials they use on-premises, but some don't have (and don't want to implement) an ADFS infrastructure. The difference with ADFS federated identity management is that the password is verified by the on-premises ADFS as opposed to being synchronized to Entra ID. A third-party identity provider might also be considered in place of ADFS.

Note: Both the Entra Connect and SSO services should be deployed before running the Hybrid Configuration Wizard.

Within a hybrid configuration, you use AD synchronization to replicate mail-enabled user account AD information from

on-premises up to your Microsoft 365 organization. This ensures a unified global address list (GAL).

Note: You need a separate server on-premises to install AD synchronization.

Directory synchronization works mostly one-way, from on-premises AD to Entra ID. And that can lead to some odd issues. Mitigating those issues can be a bit of a bear (think of the work you used to do with the *ADSI Edit* tool). It's all part of the deal though and, yes, Microsoft is aware of the problems: goto.cg/400Ye4u

The HCW does a ton of behind-the-scenes work. It configures Exchange Federation (unless you already have federation trusts established), sets up Web services for mailbox moves, and configures send/receive connectors for mail flow coexistence, to name a few.

Note: Make sure your certificates are in order and provided by a trusted third-party agency.

When you run the HCW, you'll address a few questions regarding your environment and your needs; you have to choose the Exchange server you want to connect to, provide administrative credentials for your on-premises and M365 environments, and tell the wizard if you want to establish bi-directional mail transport through your Mailbox/Client Access servers (which is the typical configuration) or through an Edge Transport server (if you have one). You can also determine if you want mail to flow top-down through Exchange Online Protection (EOP) for Microsoft 365 security scrubbing, down into your on-premises environment, or to flow through on-premises and up to Microsoft 365 (aka centralized mail transport).

When you make the connection for a hybrid configuration and move mailboxes, you'll be using Exchange Web Services (EWS) and an RPC over HTTPS connection. EWS has limitations if used

directly, but third-party companies have worked out ways to perform multiple connections and increase performance.

One negative of the hybrid configuration is that it is now a single point of failure. If you're wondering "how long can I run in hybrid?", the answer is *indefinitely*. Some organizations have no choice but to wait for the Microsoft 365 solution to advance far enough, or for the third-party tool they need on-premises to learn to work effectively with Microsoft 365; so the hybrid mode must stay in place. But that means you'll be looking at a single point of failure until you can make the full swap.

How fast can you make all of this happen? Well, the Exchange Web Services (EWS) has a throttled limitation for data ingestion, so if you have 20TB, 100TB, etc. of data, you are going to have a bit of a hard time getting it all moved over fast. Keep in mind, you're in a multi-tenant situation with Exchange Online through Microsoft 365. In other words, you are sharing space with other companies on that server, so Microsoft has to throttle each company to ensure no one gets all the processing power.

It's essential to take your time during the planning stages to ensure a smooth migration. Mailboxes are an important aspect of the move, but not the ONLY aspect. You also want to ensure a continuation of services from the ground to the sky. And there are risks involved, so you need to plan well to mitigate those risks. Don't just sleepwalk into the cloud!

Confirm Your Hybrid Configuration Works

There are a couple of ways to test if your hybrid is working. First, you can open PowerShell in your on-premises server and type **get-hybridconfiguration** to see the results of the wizard.

There are several tests you may want to perform to convince you all is well. Here is a great article to help you test HCW configurations: goto.cg/3JzlNKH

You can also check the logs, which are located in AppData for the logged-on user (just follow the breadcrumbs to *Roaming/ Microsoft/Exchange Hybrid Configuration*). Look for the text file (not the xhcw file, which is used for the troubleshooter tool).

The Big Takeaways

Migrating mailboxes (and their contents) to Microsoft 365 isn't the easiest thing in the world. There are a lot of variables to consider and several built-in migration options.

You can choose from cutover, staged, remote/hybrid, IMAP, or Google Workspace migration. Choosing a hybrid flavor: Classic (full, minimal, express) or Modern (minimal/full) has its advantages but requires some prerequisite work for AD directory synchronization (and possibly SSO) to ensure you can run the hybrid configuration wizard, then you'll be able to onboard mailboxes to Exchange Online.

The speed with which you can move mailboxes is limited by bandwidth and throttling issues. Data may have to be extracted from a legacy solution or pooled from rogue PST files within your environment to push up to the cloud.

Some of the concerns that come up with migration using native/built-in tools include problems with migration from legacy Exchange environments, the complexity of the hybrid configuration setup, the need to be PowerShell savvy (although everyone in the Exchange admin world these days should at least be PowerShell *proficient*), the lack of time filters, auto-match, granularity, and so forth.

Rather than allowing the concerns to make the migration prohibitive, a third-party tool may be just what you need to make this process – which feels overwhelming to many – a piece of cake.

Sponsor Chapter: CodeTwo

Man! Those guys are like migration superheroes!

It's true, I'm going to tell you about CodeTwo's products. But it's not a "product pitch" in the strictest sense of the word. It's not marketing jargon or whitepaper spin. We're going to stick to the same concept we've held to through this entire eBook, a conversational discussion of the subject.

If you jump over to the CodeTwo website (codetwo.com), you can see that they have a bevy of products for Microsoft 365 and Exchange on-prem which can assist with email signatures, email flow control, attachments, autoresponders, migration, backup, and more. The solutions that they design are laser-focused on the intended task, with crisp GUI interfaces that make it easy to get the job done.

CodeTwo's Migration Tools

Data migration is one of CodeTwo's key solutions (which is fitting considering our eBook's focus here). Their migration tools help to speed up and automate the migration process significantly.

They have tools to help you migrate from one flavor of Exchange to another on-premises flavor, or to Microsoft 365 (considering the eBook you're reading). With IMAP and EWS as source server options, you can also migrate from any IMAP server (like Google Workspace, Lotus / HCL Notes, or Zimbra), hosted Exchange services (e.g. Intermedia and Rackspace) or from Microsoft 365 itself to an on-premises Exchange environment or to another Microsoft 365 tenant.

Security oriented solutions

Data encryption and support for TLS 1.2 and MFA are only some of the security-related measures used in CodeTwo's migration tools. The software implements modern authentication experience (OAuth 2.0 authorization framework) to connect to your Microsoft 365 tenant (serving as source and/or target of the migration), which means that your credentials are always transmitted in a secure manner and are not stored anywhere by the software at all.

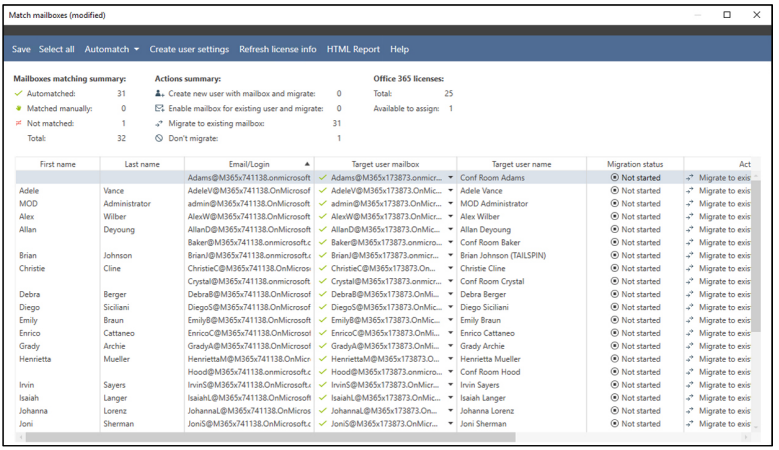
The migration tools are deployed locally, which also means the data used within and by the software cannot be accessed from outside your organization. In addition, there are no other third parties involved in the data migration whatsoever – you are solely in charge of the entire process.

The software itself is developed and supplied in accordance with ISO/IEC 27001 and 27018, and by following the privacy by design and privacy by default principles, so you can rest assured it has what it takes to offer maximum security at all stages of migration.

Seven Exciting Advantages Over Native Solutions

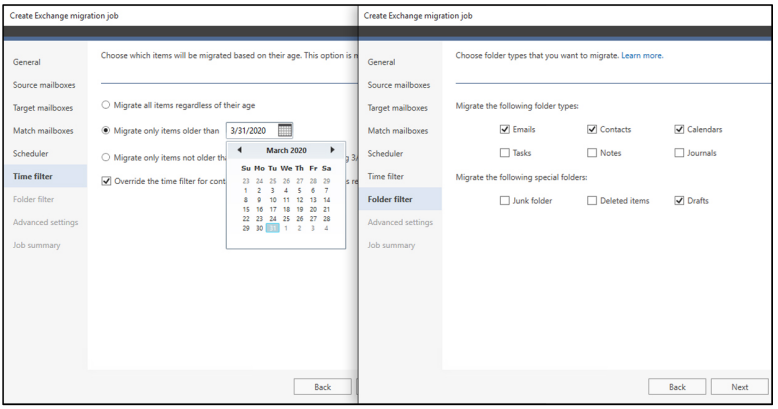
1. **No limitations on number of migrated mailboxes** – you can migrate all source mailboxes (primary and archive), from Exchange 2010 and later versions, within a single migration task or in batches – whichever option best serves your needs. CodeTwo's migration tools also support public folders.

2. **Auto-matching of source and target mailboxes** with just a click of a button. Mailboxes are matched based on first/last/display name attribute by default, but you can also customize the matching mechanism.



3. **Automatic creation of target mailboxes** – if there is no match for any of your source mailboxes, you can create a new primary mailbox in the target environment directly in CodeTwo's migration tool (user AD attributes will be copied as well). The software can also automatically assign Microsoft 365 licenses.

4. **Time and folder filters** – you can, for example, migrate data from the last 30 days, switch MX records, and let your users start using Microsoft 365. Then you can migrate the rest while your users are already live in the cloud. With the folder filter option, you can also exclude Calendars, Tasks, as well as special mailbox folders such as Deleted Items, Junk Email, etc. from the migration.



5. **No hybrid required** – you don't need to synchronize your on-prem environment with Microsoft 365 at any time prior to, during or post the migration process.

6. **No impact on end users** – the software migrates mailboxes transparently in the background, which means the users will have access to their mailboxes all the time, with no downtime.

7. **No PowerShell scripting** – CodeTwo is a 100% GUI-based product. There is no need to use any PowerShell commands or scripting of any sort to proceed with your migration.

Other notable features of CodeTwo's migration tools:

- Migration jobs: configure multiple migration tasks with different source server selected (on-prem Exchange, hosted Exchange, Microsoft 365, or IMAP) or settings, such as migrating different groups of users, primary/archive mailboxes only, or using alternative time filter settings.

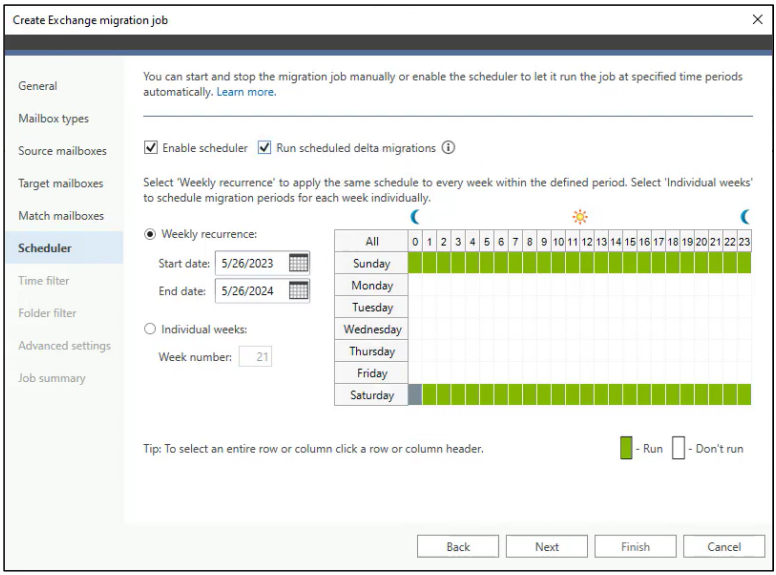
- Hybrid environment support: use hybrid Exchange deployments as either the source, target, or both in the migration process.

- Active Directory / Entra ID attributes support: migrate AD attributes such as Company, Department, Title, Phone, etc., along with mailboxes.

- Delta migration: copy new items created in the source environment during or after the initial migration, with unlimited rescans.

- Detailed migration reports and email alerts: monitor every step of the migration process with comprehensive reports, which can be shared with clients or management.

- Built-in scheduler: activate and deactivate migration jobs automatically. This allows you to prepare your migrations in advance and run them, for example, during off-hours or weekends.



- **Item size limit settings:** exclude items that Microsoft 365 cannot accept and filter out larger files during the initial migration to speed up the process.

- **Email address refresh:** migrate your data seamlessly, even when domain changes during the transition.

- **Role-based access control:** the software does not require domain/global admin privileges to connect to on-premises Exchange. A user account used to run the migration only needs the necessary management roles, which the program can assign automatically.

- **MSP-friendly licensing:** install the migration tool on multiple machines by using the same license key. This allows partners to run (and speed up) multiple projects, as they can migrate virtually an unlimited number of clients/organizations by using just a single license key.

- **Enhanced migration and throttling algorithms:** each new version of the software improves migration speed, stability, and throttling efficiency, minimizing the chance of getting errors during the migration.

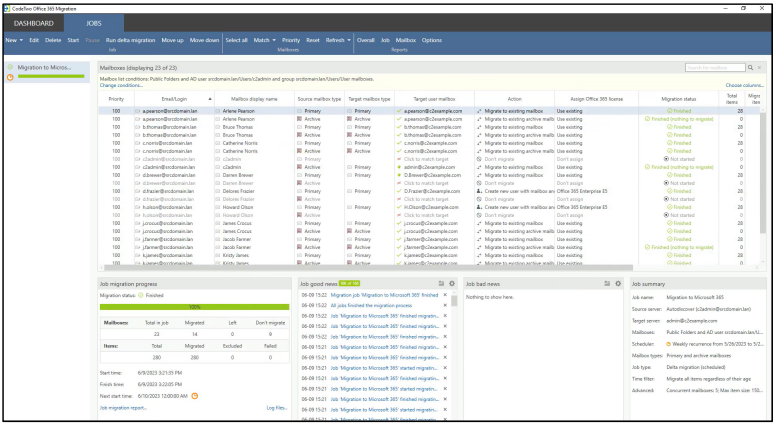
- **Free tech support:** live support provided over the phone or through email.

Installation and User Experience

The installation process is as easy as can be, following a simple "Next-Next-Finish" experience. Connecting to Microsoft 365 is done through a simple wizard.

Once connected, the intuitive graphical interface allows for seamless migration task management. As I've said in my review of CodeTwo migration tools for MSExchange.org, I love a tool that is advertised as being able to perform a task, and it does just that. Smooth, elegant functionality with a polished interface.

Watch this step-by-step video guide to begin your migration in just minutes: **goto.cg/4fPY88j**



More from CodeTwo

In addition to migration solutions, CodeTwo is best known as the leading email signature management software vendor. Their cloud solution, CodeTwo Email Signatures 365, enables centralized management of email signatures and disclaimers for all email apps and devices, including Windows, Mac, mobiles and tablets. This solution allows you to, among other things, unify email signatures and automatic replies throughout your entire organization, add Microsoft 365 users' photos to signatures, run marketing campaigns and track their performance, and view email signatures as you type or in the Sent Items folder, and measure customer satisfaction through the use of one-click surveys in emails. Admins can even delegate signature-related tasks to other departments without compromising the security of your Microsoft 365 tenant.

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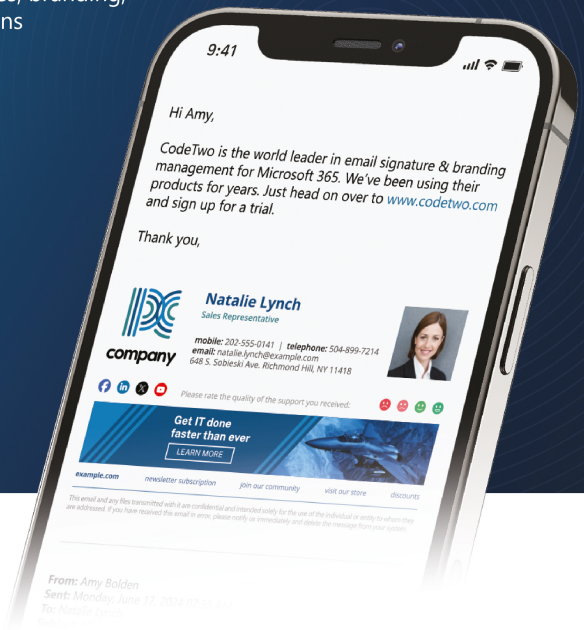

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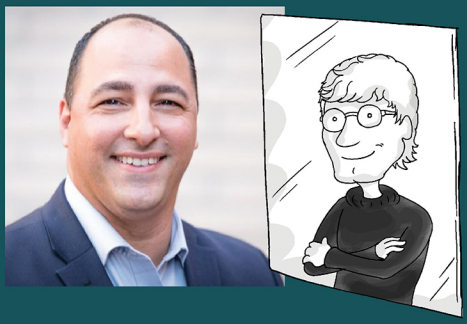
Quickly become conversational about Microsoft 365 mailbox migrations in any setting.

Despite Microsoft 365 being the leader in cloud-based productivity platforms, not everyone has migrated from on-premises Exchange – and rightly so, as it can be an overwhelming task to plan and execute a solid mailbox migration strategy. In this book, we'll work through migration strategies and options available with key tools provided by Microsoft and CodeTwo.



About J. Peter Bruzzese

J. Peter is an 9-time Microsoft Office 365 MVP, holds a variety of certifications (MCSE/MCITP: Messaging, A+/Network+, etc.), is an internationally published author and conference speaker, InfoWorld journalist, ClipTraining Co-Founder and CIO and more. Follow him on Twitter @JPBruzzese

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