

## Onboarding with Intermedia's Cloud Concierge team

# Worry-Free Communications Plan



*We developed this communications plan from our experience with migrating over 500,000 mailboxes since 2010. It's designed to offer full visibility into the process and ensure a worry-free experience.*

### Your dedicated onboarding technician

- Your migration is coordinated by a dedicated technician from our Cloud Concierge team.
- He or she is your single point of contact throughout the entire duration of your migration.
- Your onboarding technician will provide you with their direct contact information, including phone and email and hours of availability.

### When you can reach us

- Your dedicated technician will let you know his or her hours of availability.
- Every effort will be made to match your availability. If you require coverage during off-hours, please discuss these needs with your onboarding technician.
- Our shifts are typically Monday-Friday during normal business hours. Your onboarding technician will not be able to reply to messages outside of their shift.
- Messages sent over the weekend and overnight will have less prompt responses than those sent during normal business hours.
- If you need assistance outside of your onboarding technician's work hours, call (800) 739-7729. Select option 1 ext 5121 and enter your case number. We're happy to help—but keep in mind that only your dedicated technician will have full familiarity with your account.

### A single point of contact on your side

- Our processes work best when your organization has a single point of contact.
- If you must have multiple contacts, please inform your onboarding technician and provide the other contact's information within your onboarding ticket.

### Please send emails via our ticketing system

- Your onboarding technician sends all emails through our ticketing system. This helps us capture and distribute knowledge about your systems to all our team members.
- To avoid delays or confusions, we ask that you do not email your onboarding technician outside of the ticketing system.
- Feel free to call. Your onboarding technician will summarize your conversations within the migration ticket to ensure its captured and distributed.

### For urgent issues

- Urgent issues are best addressed over the phone. If you need help, please call your onboarding technician.
- If you can't reach him or her, call our support line at (800) 379-7729, option 1 ext 5121.
- If further escalation is necessary, please refer to the escalation document provided in your packet.

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# Free services included with your migration



*The following list describes the services that our Cloud Concierge team provides free of charge, as part of your Exchange migration.*

- **Dedicated onboarding technician.** A dedicated technician coordinates your migration. This technician—who is selected to match your time zone—is your single point of contact throughout the duration of your migration.
  - **In-depth discovery process.** Intermedia facilitates a review of your existing Exchange environment to fully understand your system and craft a custom migration plan.
  - **Worry-free communication plan.** To keep you informed about the progress of your migration, Intermedia works with you to identify the best methods of communication. We'll craft a communications plan with recurring checkpoints to ensure that you are fully informed as we make progress on your migration.
  - **Source server configuration instructions.** Our migration processes require your source server to have certain configurations. We'll provide setup instructions and best practices to help you configure your server for a successful migration.
  - **Assistance with non-Microsoft email clients.** To make an easy transition for your users, Intermedia will provide setup instructions and best practices for configuring non-Microsoft email clients to work with our hosted Exchange service.
  - **DNS guidance.** Intermedia provides guidance and suggests the appropriate DNS record changes related to your migration to our system.
  - **Data transfer guidance.** Intermedia identifies the best method for transferring the data from your existing Exchange environment to our servers. If necessary, we also offer troubleshooting steps to smooth the data transfer.
  - **Active Directory migration and object creation.** Intermedia identifies the best method to copy your source environment's Active Directory objects. Where applicable, we perform the copy using our proprietary tools.
- Intermedia is also responsible for the creation of all account objects, including Mailboxes, Distribution Lists, Public Folders and Contacts.
- **Mailbox content transfer.** Intermedia will recommend the best method to perform the bulk and differential data transfer. Each migration includes one bulk data transfer and one differential data transfer.
  - **Dedicated resources at time of cutover.** Intermedia will assure that all the appropriate resources are available during the time of cutover. These Cloud Concierge experts monitor your cutover to ensure a successful transition to our system. Only one cutover is provided by Intermedia.
  - **Active Directory sync setup.** Intermedia provides guidance for setting up and configuring UserPilot, our proprietary tool for syncing your on-premise Active Directory with our cloud.


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# Overview of the Exchange Onboarding Process





Intermedia's three-phased process for hosted Exchange setup and migration is designed to assure a worry-free experience—with no downtime or interruption to your business. Each phase requires activities to be performed by both Intermedia's Cloud Concierge team as well as by your IT staff.


### Phase One:

Responsible party	Activity
 <b>INTERMEDIA</b>	<b>Step 1:</b> Export Active Directory configuration <b>Step 2:</b> Import Active Directory configuration <b>Step 3:</b> Set mailfilter redirection
<b>Customer</b>	<b>Step 4:</b> Change MX record <b>Step 5:</b> Set cutover date

### Phase Two:

Responsible party	Activity
 <b>INTERMEDIA</b>	<b>Step 6:</b> Copy mailbox content
 <b>INTERMEDIA + Customer</b>	<b>Step 7:</b> Verify mailbox data copied successfully
<b>Customer</b>	<b>Step 8:</b> Create Autodiscover record

### Phase Three:

Responsible party	Activity
<b>Customer</b>	<b>Step 9:</b> End user setup
 <b>INTERMEDIA</b>	<b>Step 10:</b> Cutover to new account <b>Step 11:</b> Remaining email is exported/imported
<b>Customer</b>	<b>Step 12:</b> Wireless device setup

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# Responsibilities and Activities



### Pre-kickoff

	Our responsibilities	Your responsibilities
<b>Single point-of-contact</b>	We will identify a dedicated onboarding technician to serve as a single point-of-contact during your migration.	You will be asked to identify a dedicated single point-of-contact to facilitate all migration-activities on your end.

### Phase I

	Our responsibilities	Your responsibilities
<b>Initial call</b>	We'll introduce your Cloud Concierge team and share direct/off-hours contact info.	You'll be asked to provide the correct server connection settings (such as FQDN, proxy, etc.). We'll determine what settings we need as we learn more about your current environment.
<b>Due diligence and discovery</b>	<p>Information we'll seek:</p> <ul style="list-style-type: none"> <li>Your geographic location (for datacenter site selection)</li> <li>Your current email environment, including any Autodiscover issues associated with internal Exchange 2007/2010 migrations</li> <li>Elements for migration, including Public Folders, BlackBerry Enterprise, or any Exchange 2013 considerations</li> <li>Any copiers/apps that will send email</li> <li>All server, user and connection info</li> </ul> <p>Information we'll provide:</p> <ul style="list-style-type: none"> <li>Mailbox hygiene tips for mailbox size, item count per folder, individual mail item size, etc.—and how hygiene can impact migration</li> </ul>	<p>You'll be asked to:</p> <ul style="list-style-type: none"> <li>Troubleshoot connection issues in conjunction with Intermedia engineer</li> <li>Repair/re-configure servers as needed</li> <li>Create an ExMerge user or provide individual usernames and passwords</li> <li>Provide correct permissions for Public Folder copy</li> <li>Schedule and allocate internal resources to perform client-specific tasks (such as project management)</li> <li>Complete discovery of all systems that are integrated with your email but not related to our services (faxes, copiers, newsletter software, CRM, UM, etc.)</li> <li>Confirm access to third-party services such as domain registrars and DNS hosts</li> </ul>

- Which Outlook Profile settings don't carry over to new Intermedia profiles (Rules, Categories, auto complete cache and signatures)
- The potential for .OST download to slow your network and your user's Outlook clients. We'll suggest staged Outlook profile creations / .OST downloads, with remaining users using OWA.
- If you're currently in an Exchange environment, you'll confirm if ROH (Outlook Anywhere) is enabled and an ExMerge account is available
- You'll be asked to review our HostPilot Control Panel to understand its functions

### Test connections

As part of our testing process, we will:

- Test access to all mailboxes from Outlook, our onboarding wizard, or web services
- Notify you about any problem mailboxes
- Review legacy Exchange DN to determine if there will be x500 issues, if you're coming from an Exchange environment
- Explain methods of user creation—e.g. GAL export, CSVDE
- Confirm your password preferences: random, preset or ADsync

While we're performing our testing, you'll review the mailboxes, contacts and distribution lists on your source server.

### Create objects

We'll import your Active Directory object list.

You'll be asked to:

- Review your list of contacts, groups and users after object creation, in your new account
- Carefully confirm that all necessary objects exist on Intermedia's server
- Recreate permissions for mailboxes and Public Folders

### Set MFR

We'll identify the mailflow path with your input. We'll suggest proprietary tools, if necessary.

You'll be asked to:

- Change your MX record
- Test your mailflow in conjunction with Intermedia



**INTERMEDIA**

We're here to assure a worry-free onboarding experience. Contact us any time:

CALL US:  
1.800.739.7729, option 3

EMAIL US:  
CloudConcierge@intermedia.net

ON THE WEB:  
Intermedia.net/Support

## Phase Two:

	Our responsibilities	Your responsibilities
Initial data copy	<p>We will:</p> <ul style="list-style-type: none"> <li>• Explain the initial data migration process</li> <li>• Describe the differences for IMAP data migrations, if applicable</li> <li>• Consider the effect of migration on your network and throttle tasks appropriately</li> <li>• Monitor the migration and keep you informed on the progress</li> </ul>	<p>You'll be asked to:</p> <ul style="list-style-type: none"> <li>• Consider available network bandwidth</li> <li>• <b>WORK WITH YOUR ONBOARDING TECHNICIAN TO DETERMINE THE APPROPRIATE NUMBER OF CONNECTIONS</b></li> <li>• <b>PERFORM A QA OF MAILBOX CONTENT</b></li> </ul>
Initial Public Folder copy	<p>We will transfer your Public Folders to your new Intermedia account.</p>	<p>You'll be asked to:</p> <ul style="list-style-type: none"> <li>• Perform a QA of Public Folder content</li> </ul>

## Phase Three:

	Our responsibilities	Your responsibilities
Cutover and differential data copy	<p>At the scheduled time, we will perform the cutover. We may need to verbally confirm this act with you, depending on our previous discussions.</p> <p>We will initiate the copy and monitor the task.</p>	<p>You'll be asked to:</p> <ul style="list-style-type: none"> <li>• Create, modify and deploy group policy/logon script</li> <li>• Set up Outlook profiles using either OPH, SSO or Autodiscover</li> <li>• Create external Autodiscover record</li> <li>• Delete all internal Autodiscover entries</li> <li>• Set up your users' mobile devices</li> <li>• Reconfigure all SMTP-enabled devices to use the new hostname for our unauthenticated relay server</li> </ul>
Verify project completion	<p>Intermedia verifies the fulfillment of our migration responsibilities.</p>	<p>You verify the completion of your migration responsibilities.</p>