A 360-DEGREE GUIDE TO CHOOSING & MIGRATING TO A NEW EMAIL CLIENT
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Even with the advent of new communication channels across the business world, nothing trumps email. For most corporate users, email is woven into the fabric of their typical work lives—and that’s not going away any time soon. According to Radicati Group, in 2017 the number of worldwide emails sent every day totals over 269 billion and by 2021 that number will reach 320 billion.1

Amid this growth, there are more choices than ever in how a user interacts with this deluge of email. It’s a very crowded market for email clients with a wide range of features and options available both directly to the consumer user and through centralized business platforms. As organizations deal with a range of usability and data security issues, they’re frequently finding that the default email clients their employees are using may not be tracking to the organization’s needs. When it comes to a high touch-point solution such as email, the pull of inertia can be strong. A major technology change can be disruptive and leaders are often concerned users will struggle to deal with such a major change in their everyday work lives.

Nevertheless, it can be worth it in the long term for an organization to shift to a new email client if the new solution is chosen prudently. When a smart migration path is planned and carefully put into place, the benefits stack up. A few big drivers include:

**Better manageability:** An email client embedded in an overall enterprise mobility management solution can provide a greater degree of manageability -- and, ultimately, security -- than a default client.

**Improved security and compliance:** Tightened security regulations such as GDPR may require more stringent security controls provided by a newer email client tailored to such requirements.

**Lowered TCO:** Often a switch to a new client can bring budgetary benefits, either through lower costs in licensing, manageability or other TCO factors.

The key to a successful email migration for organizations is to find ways to minimize growing pains while maximizing and promoting benefits of the change. Most critical to this is taking into account the impact that a new email client will have on user productivity and planning a path that smooths the transition for these stakeholders.

**Why Migrate? Common Customer Goals**

Before coming up with your plan on how to migrate to a new client, it is crucial to understand why you’re endeavoring to make a change. Putting a fine point on these reasons will help the organization keep primary goals in mind through each phase of product selection and migration. The reasons are varied and they’ll likely depend on not just each organization, but even by business group. The most common denominators for change come down to four key desires.

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First, many organizations seek out a new client in order to provide BYOD employees with access to mobile email that has a lightweight management footprint while still satisfying IT security requirements.

Second, tech leaders are frequently looking for a way to unify user experience and streamline troubleshooting and management across the user base. This means they need a client that delivers a common experience across a highly fragmented mobile market including a plethora of Android and iOS devices.

Third, organizations need a way to comply with regulatory constraints and advanced security requirements for confidential or protected information. For many businesses, this is a non-negotiable feature and is the main driver for change.

Finally, organizations realize that email use can make or break an employee’s effectiveness and they’re seeking ways to enhance end-user productivity by enhancing business user-centric features or simplifying workflows. As they change, they want to make it easy and desirable to use the email client.

Making A Transition Plan
A typical organization migrating to a new email client will do so through six major phases:

1. An RFP to compare major features and narrow contenders down to a smaller field.
2. A proof-of-concept/greater depth evaluation phase that allows IT to put a product through its paces.
3. An internal pilot to see how power users do with potential products.
4. Phased rollout of the chosen product.
5. Transition to maintenance.
6. Eventual deprecation of the previous solution.

All of this follows a fairly standard playbook that we see with most IT products, but if organizations only follow these steps they may be missing a key ingredient for success specific to email client. So, what’s missing? A transition plan for users.

As organizations migrate, they should find a way to insert the following elements of this plan throughout their migration path.

1. “Sell” the solution to users. From early on, the organization should work to educate users on why the transition needs to occur. Document how the client will increase security and why it is important for the business to make the change. More importantly, find ways to explain how this change will improve users’ daily work lives.

2. Pick a deployment model that works for users. Typically, a migration will happen through a phased rollout. Phase 1 is a side-by-side stage where the new client is
available alongside the existing application. Phase 2 cuts off access to the original mailbox. Find a way to make the actual change as easy as possible.

3. **Don’t fear over communicating.** At every stage of testing and rollout, inform users in numerous channels when and how things will change. Consider it almost a marketing project, and if possible bring in internal marketing teams to help with outreach.

4. **Provide sufficient training.** Ensure documentation such as user guides and FAQs are hosted and accessible to all users. Consider producing videos and blogs with tips and tricks on how to get the most out of the client.

5. **Prepare your helpdesk.** Plan in advance how you’ll support users’ early flood of questions and troubleshooting during the earliest phases of rollout. The more with-it your support team is, the easier it will be to breed confidence among the user base that early problems are simply a learning curve issue rather than an innate problem with the technology.

6. **Get creative.** Set up a help desk in a high traffic area or schedule a webinar if your employees are remote. Discover ways to get users excited about a new solution and be sure to highlight features that encourage users to learn more.

As organizations execute on this plan, it’s crucial to include user-centric metrics to watch the overall progress of the migration process. Find a way to track variables such as positive end-user sentiment, user adoption relative to the previous solution and IT helpdesk traffic levels relative to previous levels prior to migration. Measure these patterns both before and after roll-out. These metrics will enable an organization to identify potential hotspots in user attitude toward the product and proactively address problems that may be occurring. This step is vital to ensuring the overall success of the migration.

**Common Challenges**

When organizations migrate to a new email client, the challenges they face typically revolve around three major areas: security, infrastructure and architecture, and management footprint and privacy. Addressing these challenges can greatly increase chances of success.

**Security**

Organizations should consider the context of previous user interactions with security policies when coming up with a new regime. Selecting security policies that are either too stringent or too lax relative to the overall company security posture will likely result in pushback. For example, not allowing biometrics and requiring a complex passcode where only a simple numeric passcode was previously required is going to rattle some users. If this is non-negotiable, then the organization needs to account for that with a higher degree of user outreach.

Poorly communicating expectations around security policies that will be enforced during rollout or changes made post rollout will negatively impact user sentiment.
Infrastructure & Architecture
Consider current and future infrastructure or architecture plans that will have a material impact on email systems, directory or identity management, or other related product capabilities, including features like intranet browsing and document editing. In order to avoid too many negative impacts, organizations should factor the following into their decision-making process:

- Will we be migrating from on premise to cloud-based services?
- Can we adopt the latest capabilities for end-user identity and authentication, including two-factor authentication or conditional access controls?
- Will we be able to choose how to implement access control mechanisms to block unapproved users, devices or mail clients?

Management Footprint & Privacy
One of the major barriers to success in an email client migration is poor solution adoption due to an overwhelming management footprint on personal devices without adequate justification. Organizations run into trouble when they fail to take future use cases or parallel projects into consideration. For example, an organization that chooses a MAM-only solution with no device management capabilities with a parallel project for using certificates for connecting to corporate Wi-Fi will surely face headaches.

That’s not to say that big changes can’t be made in how an organization manages user interaction with email. It’s just that those changes need to be made alongside an abundance of user education and communication. A lack of end-user communication prior to, during and after rollout of a new solution is a fast way to torpedo a migration project—particularly when changes are drastic.

To overcome this challenge, communication and education should focus on setting expectations and doing so with simple and clear steps for the user. The migration team needs to recognize that all change is hard and endeavor to internally market the new solutions. Organizations can greatly lower the impact of change by providing tips and tricks that will help users get up and running quickly. This includes showcasing product features and settings that help employees be more productive and allow them to tailor the solution to how they work. In the same vein, they should be clearly documenting device management capabilities to head off common concerns and questions early in the process, such as:

- Why is a complex passcode required?
- Why can’t I copy content out of my email?
- Can IT read my personal calendar, messages or see browsing history?

Finally, all of this education and communication should be readily accessible. This means providing readily available channels for help via email, phone or online. Organizations may even want to consider running onsite help desks to answer questions for the largest offices during rollout.
VMware Workspace ONE and VMware Boxer Can Help:
VMware not only provides the right mix of features to make an email client migration to VMware Boxer worthwhile, it also provides a plethora of tools for minimizing the disruption that a transition can pose for an organization. As you make your transition plan, consider:

**Making POCs Easy with VMware Test Drive**
- Discovering built-in Boxer workflows can save employees time with common tasks;
- Leveraging Workspace ONE Adaptive management to give BYOD end users a choice over the level of management;
- Supporting legacy and future identity management with VMware AirWatch and VMware Identity Manager (vIDM);
- Taking advantage of the latest and greatest capabilities provided by Android for Work;
- Reviewing security capabilities across device platforms required to determine whether native mail or VMware Boxer is the right match for your security posture;
- Increasing employee productivity and simplifying workflows with Workspace ONE mobile flows in Boxer;
- Using the Workspace ONE Adoption Kit resources to get end users excited about the upcoming solutions, with pre-built guides and videos.

Workspace ONE mobile flows enable our customers to surface context-based actions and insights in VMware Boxer, allowing users to complete tasks across many backend business systems—all without leaving the Boxer application. Organizations can leverage Workspace ONE mobile flows through preconfigured, out-of-the-box connectors or custom developed services with minimal development. For example, a customer can leverage our Salesforce connector to allow sales staff to easily create a contact in Salesforce or update an opportunity without requiring the user to open the Salesforce application.

To help increase employee adoption, VMware has created a Workspace ONE Adoption Kit, available to all customers. The kit includes an end-user focused website and customizable, pre-written promotional materials to educate employees on Workspace ONE and the productivity apps, including VMware Boxer. The goal of the kit is to introduce the deployed solution, showing the benefits, features and how to get started. The Adoption Kit is available for download on myAirWatch and the end-user site is available at https://www.whatisworkspaceone.com.