



EMC Consulting Brings Specialized Expertise and a Unique Approach to Migration from Lotus Notes

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Management Summary

Application migration is a little like moving to a new house. It takes planning, coordination, and effort to make the transition as smooth as possible. You have to pack and arrange for transporting all of your household items. You have to decide what to keep, sell, and throw away, which can be daunting as you clear out shelves and boxes in the basement, attic, or garage. But there is a benefit in making the move, whether you are going to a better location or living space or to work a new job. Likewise, application migration requires planning, teamwork, and effort. If the migration is well executed, it can avoid disrupting workers and business operations. Moreover, once the migration is complete, the enterprise has access to new and more powerful software capabilities that can accelerate the performance of the business.

Some enterprises have decided they want to migrate from IBM's *Lotus Notes* and *Domino* platform for messaging and collaboration. While each enterprise has its rationale, common motivations include:

- Delivering the latest, most advanced features to their users
- Considering other technology options when faced with a major platform upgrade to *Lotus Notes 8*
- Standardizing and consolidating on the Microsoft software stack (e.g., *Exchange* and *SharePoint*)
- Moving to software as a service, delivered via the Internet
- Gaining easier access to IT skill sets

Since messaging and collaboration are critical business tools, it is important to take a well-prepared, methodical approach to migration that minimizes disruption. The technical aspects of the migration present unique challenges and architectural decisions, along with the business aspects of organizational change management and communication planning. Enlisting outside expertise can help mitigate risks of a Notes migration, accelerate the transition, and recognize the benefits of the new target environment more rapidly.

EMC Consulting offers a service for migrating from IBM Lotus Notes and Domino migration environments called *EMC NoteSwitch Migration Services*. They specialize in migrating to Microsoft technologies such as Exchange and SharePoint, but also have the flexibility to migrate to other application environments according to client needs and preferences.

EMC takes a structured approach that includes distinct phases of Notes application discovery, rationalization, roadmap creation, and execution. Co-existence is a key element of EMC's strategy, where the IBM and Microsoft environments operate in tandem with synchronized objects to ensure a smooth transition. EMC has significant enterprise-scale experience in Notes migration and received Microsoft's Notes Transition Partner of the Year Award for 2009.

Read on for more details about why companies are migrating from Lotus Notes and Domino, how to begin planning a migration strategy, and how EMC's NoteSwitch Migration Services can help.

IN THIS ISSUE

- **On Migrating from Lotus Notes 2**
- **Prepare for the Migration Process 2**
- **EMC NoteSwitch Migration Services 3**
- **EMC's Experience in Notes Migration .. 5**
- **How to Engage and What to Expect..... 5**
- **Conclusion 5**

On Migrating from Lotus Notes

If you are reading this report, it is likely you are considering a migration from IBM *Lotus Notes* and *Domino* to another solution for enterprise messaging and collaboration. Since Microsoft is a leading provider in this category, it is also likely your target environment will include Microsoft *Exchange* and *SharePoint*. Many enterprises have made this transition, especially over the last several years. While each enterprise has its reasons, several factors seem to drive migration from Notes.

- **Delivering the latest, most advanced features to their users** – Product features in messaging and collaboration have expanded steadily and advanced over the years. Enterprises with older versions of Notes may want the latest capabilities for mobile and web browser access, integrated search, portals, security, integration with office productivity tools, composite applications, and unified messaging (i.e., email, voice mail, faxes) to improve the productivity of their workers and the efficiency of IT administrators. Application developers may also want to leverage Microsoft's robust .NET framework to extend, enhance, and integrate with their software stack.
- **Considering other technology options when faced with major platform upgrade to Lotus Notes 8** – IBM Lotus Notes and Domino 8 deliver many advanced features, but they also require a major platform upgrade. For instance, portal functionality requires deploying IBM *WebSphere Portal* software. Faced with the prospect of a major upgrade project, enterprises are taking the time to consider other platform options for messaging and collaboration.
- **Standardizing and consolidating on Microsoft's software stack** – Microsoft is a major player in enterprise software with a broad and integrated offering. As key parts of it, Exchange and SharePoint are the market share leaders for messaging and collaboration. Some enterprises have made a strategic decision to standardize on Microsoft's software stack. For instance, many Notes/Domino customers are already running Microsoft's Active Directory for other applications, so switching to Exchange and SharePoint and consolidating directory services makes IT administration more efficient. Through software standardization and consolidation, enterprises aim to

lower acquisition costs through bundled pricing, simplify management, lower TCO, and take advantage of capabilities that come from integrated applications. This strategy avoids the challenges associated with managing multiple software silos and/or multiple applications for the same function.

- **Moving to software-as-a-service, or SaaS** – SaaS and cloud computing are gaining momentum and real traction in the marketplace. Some enterprises want to procure messaging and collaboration as subscription-based services delivered over the Internet. This eliminates the capital expenditures and continuing administrative costs associated with a do-it-yourself approach. It is also more flexible for scaling up and down. For its part, Microsoft now offers a full suite of hosted collaboration tools under the name Business Productivity Online Services (BPOS).
- **Gaining easier access to IT skill sets** – Microsoft expertise is more readily available among IT administrators, consultants, and managed services, and may be less costly to acquire than Lotus Notes expertise.

Each enterprise has to make software decisions based on its own particular situation, needs, and preferences. This list above is not so much a complete argument for migrating from Lotus Notes, but it illustrates why some enterprises are choosing to do so.

Prepare for the Migration Process

If you plan to migrate from Lotus Notes, it is important to take a well-prepared, methodical approach since messaging and collaboration tools are critical to business operations. When done properly, the migration should be minimally disruptive. Many people consider email to be their most important communication tool, even more so than the telephone. Workers use online calendars and contact management software throughout the day and depend upon collaboration tools for document sharing, working on group projects, gathering and processing information, and communicating information to the outside world.

In Notes environments, messaging can be interlinked with collaboration applications involving forms, lists, and workflow. Therefore, messaging changes affect applications, and vice-versa. This is another reason for carefully planning the order and timing of migration.

The fundamental migration process is as follows.

- **Discover, analyze, and prioritize** the Notes applications within the organization.
- **Create a detailed, stepwise migration plan** that includes how each application will be migrated and to which application platform.
- **Execute the plan**, which includes a period of messaging co-existence and separation of messaging from application dependencies. Then, migrate messaging components and, in parallel, remediate all of the applications, which could mean sun-setting, rewriting, migrating, or replacing them.
- **Train end users** on the new platforms and develop IT skills and procedures for supporting them.

The objective is to make the transition without significantly disrupting worker productivity or business operations. Again, this requires careful planning and execution. Software migration tools can accelerate the process and minimize risk. Consulting services can be very valuable, since enterprises may lack the internal expertise or spare resources to architect the target environment (e.g., Exchange, SharePoint) and ensure a successful Notes migration.

EMC NoteSwitch Migration Services

EMC Consulting offers a service for migrating enterprises from IBM Lotus Notes and Domino environments called EMC *NoteSwitch Migration Services*. EMC specializes in migrating to Microsoft technologies such as Exchange and SharePoint, but also has the flexibility to migrate to other application environments, according to client needs and preferences. EMC NoteSwitch Migration Services follows a structured approach.

Assessment

The first step EMC takes is to understand a client's goals and motivations for the Notes migration. *Is it to access the latest messaging and collaboration features and development environment? Considering other technology options when faced with the platform upgrade for Notes 8? Standardize on the Microsoft software stack? Transition to software as a service?* Clarifying the motivations and what clients want to achieve helps determine the best approach to take.

Next, EMC inventories the client's Notes environment, which falls into two categories.

- **Messaging** – Email, calendar, contacts, and address books.
- **Applications** – Documents, forms, workflow, etc.

Since Lotus Notes does significantly more than just email, enterprises using Notes often have developed hundreds or even thousands of customized applications. The migration plan must take all of them into account. To discover applications in a client environment, EMC uses automated tools, surveys end users, and personally interviews a sample of application owners and/or development teams. The surveys and interviews help validate the automated technical data and ensure that it accurately reflects the applications and how they are being used. The final output is a list of applications and associated stakeholders – a detailed blueprint of the current Notes environment. This is most important, especially when there might be hundreds or even thousands of Notes-based applications.

Rationalization

Rationalizing the applications involves analyzing, categorizing, and prioritizing them and performing target architecture planning. In a way, this is like sorting household goods stored in your basement or garage before moving. As you open boxes and clear out shelves, you discover things you want, some things you don't, and others you didn't know you had! For each item, you have to decide whether to keep it, store it, or get rid of it.

Each Notes application can be handled one of several different ways:

- **Migrate to a new application environment.**
- **Fence off and leave for its remaining useful life.** In these cases, the application may be too complex, have a limited useful life, or only need to be kept for compliance reasons. Migration would be more trouble than it is worth.
- **Web-enable** so the Notes clients can be retired while leaving the application running.
- **Re-write or replace** with an alternative application.
- **Retire immediately** because the application is no longer useful or necessary.

As you can see, Notes migration is not an all-or-nothing proposition where Notes suddenly is switched off and Exchange and SharePoint are switched on. For larger enterprises, it usually

requires thoughtful analysis and a nuanced approach to rationalizing the inventory of applications.

EMC analyzes and groups Notes applications into like categories according to their migration paths. For instance, item-tracking lists, such as action items, vacation requests, and so forth, can all be handled in a similar way. EMC creates a migration template for each group and applies it repeatedly to the applications and data, thus simplifying and speeding the overall process.

They also perform target architecture planning and design, which answers the question: *Where and how will the migrated applications run?* EMC inventories a client's existing application platforms and the ones they plan to deploy. Microsoft Exchange and SharePoint are likely to be part of the target environment, but often not exclusively so, since Notes applications may go to other application platforms, such as CRM systems or ECM systems like Documentum that already are supported as part of the client's IT infrastructure. EMC's method is *best-fit-for-purpose* – placing applications in the target environments where they are best suited.

The question of *re-architecting* versus *porting* applications arises here. If a client wants to expand or enhance an application to serve a broader purpose, that would imply re-architecting. If a client wants the same application running on a new platform, then it would be a straightforward port. EMC can take it either direction, which is part of the value it brings to this service.

Target architecture planning includes optimizing infrastructure. EMC can help re-assess backup and recovery, business continuity, management, virtualization, and storage for the target environment. The complete migration service addresses applications, data, and infrastructure.

They can also assist with determining a budget for the migration. Understanding costs is challenging because of the many factors that go into calculating the costs, some of which are soft and thus difficult to quantify. Nevertheless, part of EMC's value is their experienced help in quantifying the parameters and tasks and in establishing a timeline for the migration.

Migration Planning

The next step is to create a detailed, stepwise migration roadmap. It begins with the current state and ends with all desired applications running on the target architecture. The plan has to

account for inter-dependencies between messaging, applications, and directory services, which can affect the order and timing of migration. The plan also specifies whether migration is performed by servers, geographical regions, or organization structures.

Messaging is typically migrated first, with applications trailing behind. Messaging tends to be the more predictable and straightforward of the two.

Co-existence is a key part of this process. During this period, both Lotus Notes mail and Microsoft Exchange run in tandem using a gateway to translate between them and ensure they are *in synch*. A co-existence strategy enables:

- Notes applications that are tightly-coupled with mail to interoperate with Exchange
- An opportunity to track and replace any dependencies on Domino mail
- A smooth transition while directories, mailbox data, contacts, and calendars are transferred

In planning for coexistence, EMC will factor in the additional network traffic generated by two mail servers to make sure the network can handle it.

Execution

Next on the roadmap is execution. It begins with communicating to users and IT administrators what will happen and how the process will affect them, so everyone is aware and ready. EMC also may help with implementing the target application platforms.

Once they are in place, EMC uses a factory model for application migration. This is similar to assembly lines at a manufacturing plant that turn out products in volume, but in this case, the output is applications. Applications are grouped into migration sets, which have similar characteristics and can be handled in a similar way. Applying a migration template to each application set enables economies of scale in migration and faster execution. EMC uses software migration tools, from both third parties and its own NoteSwitch software, to automate the process. While skilled local resources perform high-touch activities like discovery, planning, and project management, remote/offshore resources can be engaged at this point for low-touch work to keep costs down.

Quality assurance and user acceptance testing are also performed. Finally, for each application comes the moment of truth, when the old func-

tionality is turned off and the client goes live with the new.

Post-operations

After the migration is complete, EMC will typically deliver periodic or ad hoc technical support for a limited time as clients learn to manage the new application platforms. This includes training and guidance for users, system administrators, and help desk personnel.

EMC's Experience in Notes Migration

In the scope of IT consulting and professional services, Lotus Notes migration is a niche service that requires specialized expertise. In this area, EMC has developed a focused set of skills as well as enterprise-scale experience:

- Converting a global pharmaceutical company with over 100,000 Notes users and 50,000 custom applications
- Converted a global manufacturer with 20,000 mailboxes and *Blackberries*, including calendars, tasks, and distribution lists, to Microsoft Exchange Online (messaging as a service)
- Won Microsoft's Notes Transition Partner of the Year Award for 2009
- Employ Lotus Notes experts to round out skills on both sides of a migration
- Has experience with all of the major migration tools
- Uses a structured, repeatable methodology for client engagement called *Assured Performance* for consistent outcomes

The scope of EMC Consulting's expertise allows it to take a flexible, open approach to Notes migration. They know the capabilities and limitations of Exchange, SharePoint, and all of the leading tools in the market, and are forthright about recommending other platforms a client may already be supporting if applications are best suited for them. An approach that goes beyond Microsoft installations often can provide better outcomes that are more aligned with business needs.

Furthermore, if a client wants to re-architect applications to streamline their businesses processes, EMC can bring to bear industry specialists with recommendations for best practices in areas like healthcare, financial services, or manufacturing. This business-level consulting goes beyond a technical exercise in migration to promote greater efficiency and productivity in an organization.

How to Engage and What to Expect

When engaging a consulting firm like EMC, keep in mind that application migration is by nature a joint exercise between the consulting firm and the client. Messaging and collaboration applications are embedded deeply in the fabric of an enterprise, and users rely on them to perform their daily roles and tasks. As such, switching platforms requires detailed planning and coordination and regular communication. EMC Consulting can lead the effort and bring its expertise to bear, though clients should expect to be closely involved. Typically, a designated client migration team will meet regularly and confer with the EMC project manager and technical leads throughout the process.

Conclusion

Migrating from Lotus Notes and Domino is possible and can bring tangible benefits in functionality, manageability, and cost of ownership. Many enterprises have successfully made the transition, and typically, to a Microsoft environment that includes Exchange and SharePoint. We are not advocating for such a move – it is up to each enterprise to make that decision based on its particular requirements, skill sets, technologies, and long-term strategy. For enterprises that do, it is generally wise to seek outside expertise because successful Notes migration requires a unique skill set that most enterprises do not have available internally.

EMC Consulting is one of a handful of IT consulting firms with significant skills and enterprise experience in Notes migration. It also brings some special capabilities to the table, like a flexible approach for the target architecture, application bundling, a factory model for migration, and its own NoteSwitch migration tool. If Notes migration is on your agenda, you should consider EMC Consulting to get you to where you need to go.



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