

23 BEST Cloud Email Questions to Ask Your Vendor

Technical Questions

1. How many mailboxes?
2. What mailbox size? (500MB-5G)
3. Where are these mailboxes hosted right now?
 - a. In-house Exchange 2003/2007
 - b. Novell Groupwise or Lotus Notes/IBM Domino, etc
 - c. Outsourced POP3/IMAP
4. How many Blackberry users (requiring BES)?
5. How many iPhone/Active Sync Users?
6. Is Sharepoint being used? Is there a desire to be in the Cloud?
7. Document types that are emailed regularly?
 - a. e.g. Large CAD files, etc.
8. Do you want OCS IM hosting too?
9. How many users need access to global calendars?
10. Email Archiving
 - a. Do you need 30 days or 90 days or 1, 3, 5, 7, 10-Year email archiving too?
 - b. Do you have specific contract needs or special archiving needs?
 - c. Examples?
11. Email Forensics
 - a. Do you have a need for a Forensics engine?
12. Do you need encrypted email/secure messaging too?
 - a. Company- wide need
 - b. Specific users that can be identified
13. Do you need a confidentiality notice/disclaimer message on all outbound email?
14. If you have VoIP, the Vendor needs to answer the following so we understand how routing between the phone system and the email system happens.
 - a. Will they support an 3rd party foreign connector from the customer premise to the hosted environment
 - b. Will they allow outlook forms to be loaded into the organizational forms folders

- c. Will they allow Exchange admin rights for the connector install
 - d. Will they allow Send as/Receive as rights on the exchange server/information store
15. Anti-spam/Anti-virus/Anti-malware Current Deployment is
 - a. Cloud Based
 - b. On premise
16. Are there any email based alerting systems?
17. Application Alerting (e.g. An app or system triggers an email)
 - a. Systems and applications connecting via MAPI?
 - b. Systems and applications connecting via SMTP?
18. Custom Email Forms
 - a. e.g. – Procurement, HR, VoIP (voicemail to inbox)
19. Fax System with Email
 - a. e.g. Right Fax, GFI
 - b. If yes, how are they integrated (connector, client, etc.)
20. Internet Bandwidth at HQ?
21. Internet Redundancy at HQ?
22. Remote Site Connectivity to Internet
 - a. Backhaul through corporate?
 - b. Edge access – primary- how?
 - c. Edge access – backup – how?
23. Audit and Compliance requirements
 - a. HIPPA, NCUA, FDIC, PCI, etc.?

Business Questions

1. Does the business prefer capital expenditure?
2. Does the business prefer operational expenditure?
3. Recovery – Do you have a recovery goal that you want to accomplish with the Exchange upgrade
4. Staffing – Are there headcount limitations to the amount of complexity you are able to take on?
5. Security – Are there specific auditing, compliance, security, or reporting that you are looking to accomplish with this project?
6. What Microsoft Agreement are you on?
 - a. Shrink Wrap, Select, Enterprise, Open Value, Don't know