

## EMAIL ARCHIVING

Planning, policies and product selection

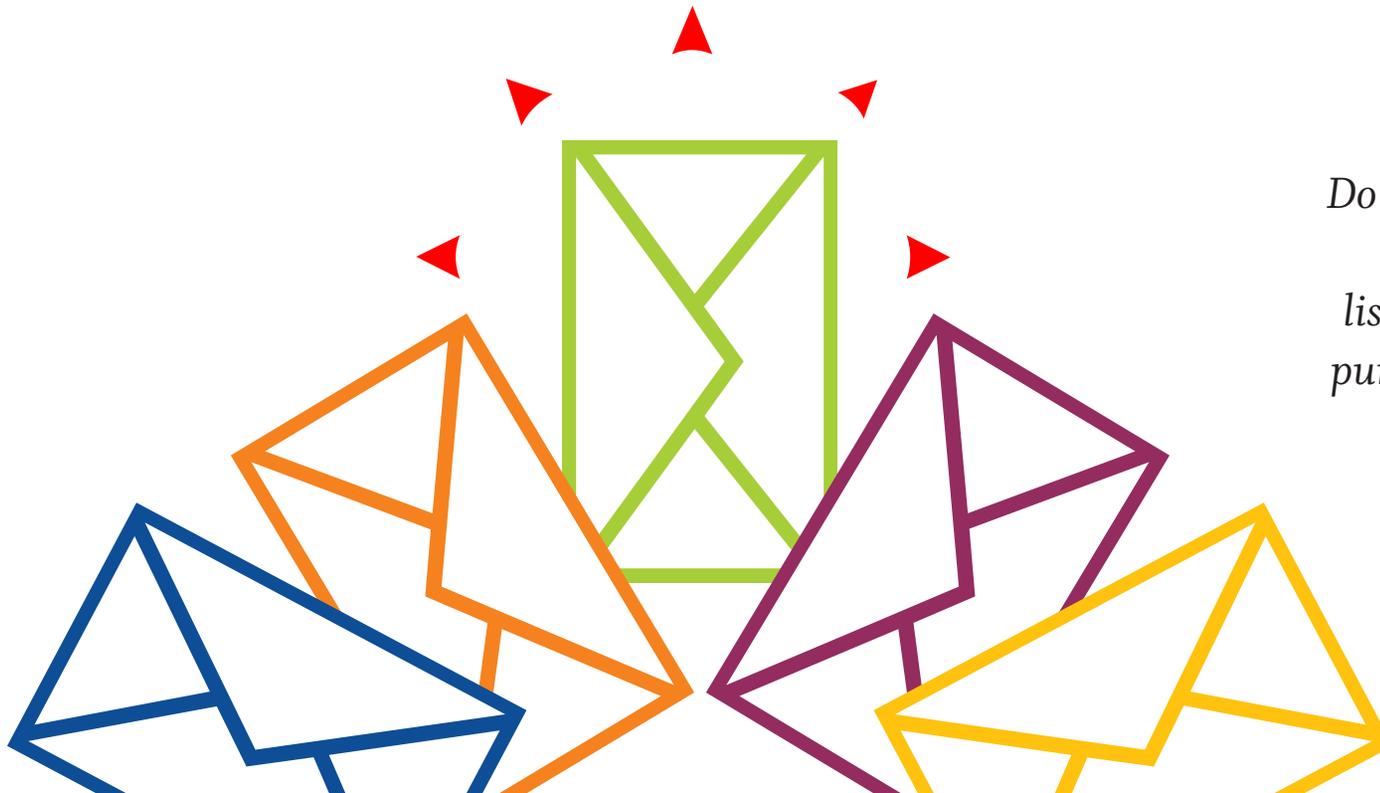
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### CHAPTER **5**

# Finding the right email-archiving product

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*Do your research and narrow down your list of vendors before purchasing an email-archiving product.*



## CHAPTER 5

# Finding the right email-archiving product

by Stephen Foskett and Kathryn Hilton

**S**ELECTING THE RIGHT vendor for any storage product is critical. IT managers don't just look for the best product. Many also want a vendor that will offer a partnership that will last from delivery and installation to daily operation and support. The same holds true for email-archiving products.

The first step toward finding a superior email-archiving product is narrowing down the list of potential products and their vendors. Although the first entries on your list should include products from vendors with whom you already have relationships, you should also consider broadening your search beyond the usual suspects. Once a list of potential email-archiving products is identified, the process of issuing an RFP begins.

[Chapter 3](#) and [Chapter 4](#) provided an overview of how to identify the features you should look for in an email-archiving system to address compliance, litigation support, user productivity and storage management.

### KEY POINTS IN THIS CHAPTER INCLUDE:

- **Conducting extensive research to develop a master list of potential products and vendors.**
- **Narrowing your list down to three or four potential products through vendor presentations and product demonstrations.**
- **Putting together an internal business case using the financial and functional information gathered during this process.**

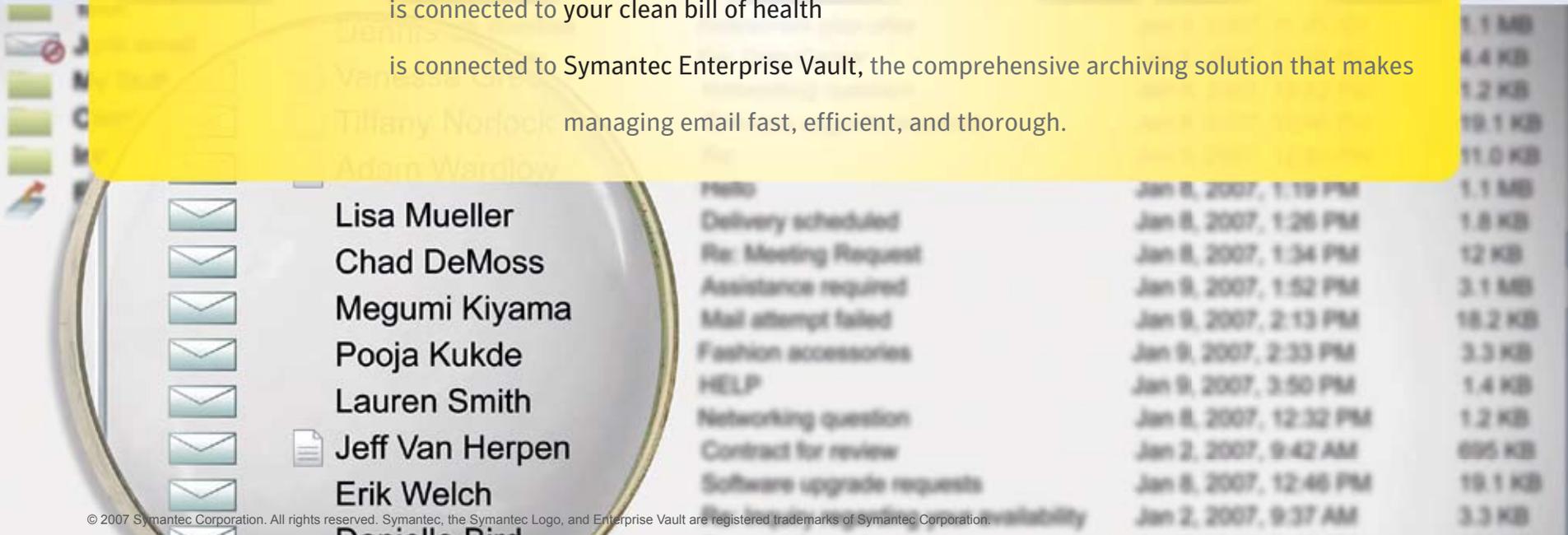


The legal investigation is connected to the discovery request

is connected to combing through terabytes of archived email

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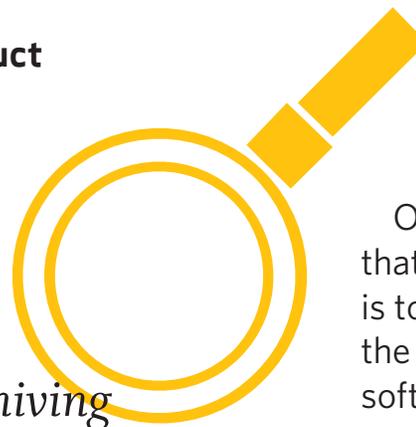
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## Researching email-archiving products and vendors



*There are a wide variety of email-archiving products — some from specialists in the field and others from big-name storage vendors. The product you select will remain in use at your organization for years to come, and it will serve a critical role in the event of litigation or compliance requirements. Because of those reasons, it is important to find the most appropriate product for your organization's needs. Cast a wide net and explore all available options rather than simply going with the most obvious choice.*

One key method of ensuring that you choose the best product is to separate the selection of the appropriate e-mail archiving software from the purchase of that product. In other words, locate the product or products that will match your requirements, and then try to pick the product with the best price point. It is likely that at the end of your search, a few standout products will be found. Any one of them might be worth recommending for purchase.

In many cases, selecting an email-archiving product and purchasing it will be two separate processes. Many companies have an engineering staff responsible for selecting the most appropriate tools and a separate procurement staff in charge of making the buying decisions. If this is the case in your organization, then separating the product and purchasing processes will seem natural. Otherwise, this may be a new experience.

## Building a master list of email-archiving products

*The first step in creating a short list of appropriate products is developing a long list of potential ones. This master list will contain all email-archiving products that might even remotely meet your requirements. Again, it is important to cast this net as wide as possible to ensure that you get the right product at the right price when you complete your purchasing process.*

An excellent way to gather more complete information — provided IT has sufficient resources — is to issue a formal request for information (RFI).



A good way to learn about potential e-mail-archiving products is to locate analyst reports. At this early stage of the process, it's probably enough simply to note the vendor and product names as well as basic information like the type of messaging applications they support. Many organizations — such as Gartner, Forrester, IDC, the Enterprise Strategy Group and the Taneja Group — regularly issue email-archiving reports.

Another good source of product leads is the press coverage found at Web sites and conferences, where reporters and speakers often give the names of competing products when covering vendor announcements. Ask some of the key vendors for storage software and hardware as well as the top resellers for their recommendations. It's likely that many will

have email-archiving applications that they are familiar with.

Once a master list has been created, the pruning can begin. Some basic technical aspects will begin to narrow down the list immediately. Start with the messaging platform — the operating system, email application and revisions that you use. Reject any application that does not support your current and projected configurations. Visit the product Web sites, noting its customer case studies and solution briefs.

An excellent way to gather more complete information — provided IT has sufficient resources — is to issue a formal request for information (RFI). This differs from a request for proposals, or an RFP, in that there are no firm configurations or price quotes. Instead, an RFI is the beginning of a discussion with vendors about the ease of using their products in the

**Many vendors will try to sell you product features that may not be at all related to your email-archiving needs.**

target environment. RFIs are somewhat uncommon in smaller organizations because they can require a month or more of effort, but they are often required at many major organizations.

If an RFI is issued, be sure to spell out the requirements explicitly. Identify email server software, operating systems and hardware, as well as the size of the environment — including total message store size and daily message volume. Ask any specific technical questions, especially if they would

disqualify a potential application. Also ask about operational issues with the software, like whether it will support varying user profiles, indefinite retention periods and multiple message stores.

Expect to be deluged with information from some vendors and ignored by others. Some are simply not capable of effectively answering an RFI, and this should not necessarily disqualify them. Some may also not be able to provide pricing information so early in the process, while others may surprise you with high list prices that may not reflect the final purchase price. Finally, be aware that many vendors will use this as an opportunity to sell product features that may not be at all related to your email-archiving needs.

## Narrowing down your list of choices

*So now you have a list of applications that will work in your target environment. Before getting details and pricing information on every one, narrow the list down to three or four standout products. To save time and energy, focus on these when the time comes to issue the RFP.*

*If an RFI was not issued, it's time to request more information from the vendors. Ask them about any necessary features because implementation may vary. Also ask to see each vendor's product development roadmap, but do not put too much weight on features that haven't been released yet. Look especially for each vendor's commitment to its product. Because your choice should last for many years, investigate each vendor's research and development in the email-archiving space.*

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→ **ASK THE VENDORS FOR PRODUCT DEMONSTRATIONS.** These may be given on site or at the vendor's customer demonstration room. Schedule a few hours for a thorough look at the products, and make sure that a cross-section of staff — both IT staff and business users — can attend. Once again, do not get distracted by features and functions that were not part of your requirements list.

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→ **TRY TO GET YOUR HANDS ON THE PRODUCT, TESTING IT OUT IN HOUSE, IF POSSIBLE.** Many software vendors will issue a short-term license key that can be used to build a test environment to simulate production systems. While testing the product, call the vendor's tech support team so you can judge its ability to respond.

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→ **USE THESE SUBJECTIVE EVALUATIONS TO NARROW DOWN THE LIST.** Some products will really begin to shine at this point, allowing the process to move on to approval and purchasing.

## Moving forward with a product purchase

Now that a short list of products has been identified, make sure the key internal decision makers that you identified in [Chapter 1](#) are ready to buy. Build a business case, showing the risks and benefits of implementing an email-archiving system architecture. Make sure to include general pricing information so the management team will be able to decide whether the product is worth the money.

Don't get distracted by features and functions that are not part of your requirements list.

### GENERALLY SPEAKING, A BUSINESS CASE MUST SHOW:

- **The level of effort required to move forward.**
- **The financial impact of the decision.**
- **Any risks associated with implementation.**
- **The benefit that will be gained by adding email archiving.**

Be concise and honest about the real benefits of the archiving product — these will typically include preparation for litigation and discovery or compliance. It is not necessary to overstate the impact of compliance because the risks will be well understood by management.

Part of this presentation to executives will have to include an accurate evaluation of the organization's current compliance capabilities — or lack thereof. This can be a

touchy subject because most email systems are lacking when it comes to compliance. Business managers may be surprised to learn about the problems your organization might have when it comes to indexing and retrieving old messages, and IT managers may not want to publicize this information. But these thorny issues must be addressed to move forward.

To figure out a realistic cost for your email-archiving product, calculate the total cost of implementation and

management for the system. Price the software with all options, any additional hardware as well as planning and implementation costs. Don't forget to budget for a phased rollout over a period of months. Consider, too, the amount of effort required to keep the system running over time, and budget for additional storage space as message volume increases.

Once the business case has been developed for email archiving, call together key internal decision makers for a

presentation. Make sure that they understand the issues that need to be addressed, the full cost of the system, and the risks associated with it. After you win their approval, you can begin the RFP process.

When selecting an email-archiving vendor and product, companies must try to map all the necessary features and requirements onto available products. Include many possible products at first, and use an RFI process to help narrow the choices. When the top three vendors and products have been selected, move on to actual product demonstrations. The culmination of this process is broad approval of an email-archiving system that meets your organization's requirements and price points.

**Consider the amount of effort required to keep a system running over time, and budget for additional storage space as message volume increases.**

# All content and no discovery?



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