

# Pilot Users & Migration Planning

## Priasoft

(Also known as User Acceptance Testing)

## Pilot Users? User Acceptance Testing?

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What is meant by these terms? Both terms in the section title refer to "trying it out small". Often in a business and due to the priority of email (it's no surprise that email is the #1 business critical system) there is pressure to "test it before we commit". Certainly there is merit in testing and Priasoft recommends many layers of testing in order to develop a migration plan that works backward from 100% success.

However, a "Pilot Group" should be carefully selected with regards to its members and the category and specific details of what the group should test should be identified and accepted beforehand. Furthermore, the style and method of the test should be carefully considered.

It is the purpose of this document to highlight concerns and pitfalls of the traditional "Pilot Group" testing. Additionally, a different approach will also be introduced that will help maintain the migration plan development of 100% success.

## Traditional Ideas

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Most often, the traditional idea is to select a small group of real users that will participate in a "mini" migration. The though process is usually something like this:

*"We have lots of different types of users that use email. We have some with mobile devices, some with special services like archiving, and some others that are "road warriors" and are rarely connected directly to the LAN. We MUST know that the different types of users will be able to access mail after migration and we need to know how to execute properly on these types of things. What better way to discover this than to actually migration some key users!"*

Additionally, the following may apply as well:

*"We are likely to migration important departments or even revenue generating groups and we MUST know that those end users will accept the experience of the new system. Therefore, we need to migration some of these key users in order to collect their input and experience so that we can adjust the plan appropriately."*

The logic is fairly sound in both cases and Priasoft would not argue against them directly in any way. However, let's examine the likely user experience with this traditional approach.

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## Focus

One of the first things to examine is the "Focus" of the testing. The common thought is that the "Pilot Group" is used to validate decisions made earlier in the development of the plan. The *hope* is that there are no issues. The hope is that all the pre-tests were done sufficiently to discover how to migrate the pilot group without issue which would validate that all possible issues were discovered and handled prior to migrating the pilot users. The hope is that the pilot users will just report back that "everything is perfect".

Let reality step in now. The real reason, and "Focus", for a pilot group is for discovery. It is used to discover issues and problems that a contrived test could never expose. This is one of the first flaws in a pilot group – using real people to discover unknown issues. The most common issue with the pilot group is that the communication to them about what their experience will be after migration is misleading. Usually administrators and project managers communicate to the pilot group that they have been selected to "validate the process", not to "discover new issues". The pilot group users start out with an expectation that there should be few if any issues. However, when previously unknown or unforeseen issues arise and begin to impact the pilot group, this group of users becomes frustrated and begins to wonder "what did we get ourselves into?" Worse is when some of the pilot group are influential and communicate their issues and frustrations to other non-migrated users. Such discontent can quickly derail the migration project.

## Boundaries and Parameters

Secondary to Focus is the description of what is to be tested or analyzed. Over the past 12 years, Priasoft has seen many different approaches to migration plans and has also seen the result of pilot groups on the perception of the migration. One area that varies the most is the definition of the Boundaries and Parameters of the pilot group's testing.

If no limits are given, then the members of the pilot group are free to complain about any and every issue that they may have, even if the issue is one they had prior to migration. As people, we, by nature, have anxiety whenever something important to us changes. As a result, we will scrutinize things very closely after the change, more so than we might normally pay attention. For email users, this means looking at features that may not have ever been used before.

If the limits of the testing are too restrictive, other issues might be missed and will cause the members of the pilot group to feel unimportant. Such a feeling is sure to create negative perceptions about the project and will likely reach back to the non-migrated majority.

It becomes extremely important to convey the proper focus to the pilot group as to their purpose and to provide an open but detailed set of parameters for which the group tests. The pilot group should be informed that the migration project team is only setup to track and work on issues based on the supplied parameters. This eliminates distracting issues that come from the high level of scrutiny that users will have on their mailboxes. If the pilot group knows up front that the migration team wants feedback on a specific list of parameters, they will focus on those items first and will know that other issues are "out of scope".

Lastly, the unintentional side effect of the pilot group is the fact that they are instantly separated from the rest of the mail organization. Regardless of how much effort is placed on co-existence features (if any), the fact that the migrated users are separated from the rest of the organization will create stress and negative perception since there are just some features of Microsoft Exchange that don't work the same way between 2 mail environments as they do in a single environment.

A more painful case is if the design and intent of the migration is to avoid co-existence – of which Priasoft and many of our customers recommend – the pilot group is, in effect, **forcing** co-existence upon the project for which there are no supporting components.

## An Improved Idea

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The value in testing with real users is to expose issues that only real users could have. User acceptance of a new system is often a business requirement that must be met before management will allow progression of the project. If the previous points have any value, then the question becomes how to perform a pilot without facing those issues?

We make this suggestion and have seen it proved out quite well: clone the pilot users' mailboxes in the source environment first, then migrate the cloned mailboxes.

This approach allows for all the discovery that can come from a pilot user group and can meet all the user acceptance tests defined. The safety net in this approach starts first in the mind of the pilot users, which is a very important feature of this approach. The pilot users will understand that nothing bad can really happen to them because their "real" source mailbox is preserved and is still to be treated as their "primary" mailbox.

Testing and discovery is performed on the cloned mailboxes. Any issues found can be worked through and documented, and if necessary those affected can be reset, and re-migrated to ensure that the documented change meets all approvals. Throughout this process, if any business critical situation arises which requires the attention of one of the pilot users, such can be easily handled since that user's real mailbox is still in the source environment. This prevents issues of coexistence and access that are described in the previous section.

When all the testing is completed, the cloned mailboxes in both environments can be removed and the pilot users will be migrated with the rest of the business on the scheduled date.