O365 CUSTOMER
CONVERSATION STARTER

01. Are there any vendors/solutions you are already considering or have spoken to?

02. Are you currently labeled as Non-Profit, Government, Enterprise or Education?

03. What is your current O365 approach?
(Record details and notes on next page)

a. What email platform are you currently using?
b. Do you have and are you using any public folders?
c. Do you have any archive data that needs to be migrated? Please describe.
d. What are you doing for email security?
e. Will you need active directory integration as part of this solution? Please describe.
f. Are you using SharePoint today?
    a. Do you need assistance in the migration and implementation of your SharePoint environment? Please describe, including current data usage.
    b. Will you need ongoing management of your SharePoint environment? Please describe.

04. Will you need any helpdesk support? Please describe.

05. Will you need ExpressRoute into your email vendor? Please describe.

06. Will you need to migrate any servers to the cloud or a colocation facility? Please describe.

07. If you want O365, do you want to use Teams for collaboration? Please describe.

a. do you want to use Teams as a UC solution?
b. what are you currently using for your phone system/vendor?(See UC Questionnaire)

08. Let's talk numbers?

a. If currently using Exchange, what version and how many mailboxes are being used?
b. How many shared mailboxes are being used today?
c. What is the average size of the mailboxes?
d. Do you require backup and/or archiving as part of this solution? Do you have a technology that you prefer? Please describe.
e. Are you looking to move your files shared to O365 (OneDrive)? Please describe.
h. What license type do you require and how many of each?
(https://www.microsoft.com/en-us/microsoft-365/enterprise/compare-office-365-plans)
    "If Education, government or non-profit, see options in the link above"
    ■ Microsoft 365 Apps for Enterprise   ■ E1
    ■ E3   ■ E5   ■ Other
i.How many licenses do you need? # of each license type...
j. Yes or No
k. If yes, please describe

09. Do you have any Compliance requirements?

■ CCPA	■ FDCC	■ FEDRAMP
■ FINRA	■ FISMA	■ GDPR
■ HIPAA	■ HITRUST	■ ITAR
■ NERC	■ NIST	■ NY DF
■ PCI-DSS	■ SOC2	■ SOX
■ TCPA	■ None	■ Other

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