

Exchange Alternatives Clear Choice Tests comparative test

Dear PR Person:

(if you're not a PR person, please forward this on to your marketing department for routing)

My name is Joel Snyder. I'm a consultant and freelance writer. Network World has asked me to test email systems for them, the results for which will be published early in 2009. While Microsoft Exchange dominates the email marketplace, we believe that our readers would like an unbiased comparison of Exchange with alternative products. As the recent acquisition of PostPath along with the continuing question of deployment of Exchange 2007 or Windows Server 2008 comes up, a responsible email manager will ask: "is this the best product for us?" We would like to look at products which compete with Microsoft Exchange in the mid-range marketplace (business with 50 to 1000 users).

If you are currently shipping a product in this space, I would like to invite you to participate in this test. Please read on for information about deadlines and timeframes. I know that this message is long, but please read at least up to the FAQs and I trust that most of your questions will be answered.

A copy of this invitation is available at the following URL:

<http://www.opus1.com/vpn/email-invite.pdf>

EXECUTIVE SUMMARY:

What: Exchange Alternatives Clear Choice comparative test

Who: Network World (print and online)

Deadlines:

Expression of Interest: by September 15th

Product to lab: by October 15th

Contact: Joel Snyder/jms@opus1.com; Christine Burns/cburns@nww.com

Lab Address: 1404 E Lind Road, Tucson, AZ, 85719

Phone: +1 520 324 0494 (but note that I will not be at that number until September 21st, so if you want to talk before then, please use email)

OVERVIEW:

We are looking at email systems (specifically, message stores) designed to meet the needs of a business that wants a production-quality email system for less than 1000 users. We know that Microsoft Exchange is the "de facto" choice of many enterprises of this

size, so we will be looking at these systems to see how well they meet the standard set by Exchange, and where they either exceed or fall behind.

Although Microsoft Exchange will be a part of this test, this is not a point-for-point comparison of email systems with Exchange. We don't expect products of this size and aimed at this marketplace to have all of the features, protocols, and support that Exchange has. This means that your product does not have to be better than Microsoft Exchange to be reviewed favorably in this test. What it does mean is that your product must be as good as, or better than, Microsoft Exchange **in the areas mid-sized business care about**. We feel that these include client and mobility support, a compatible basic feature set, scalability up to a moderate number of users, ease of use, and support for compliance and legal discovery features needed by small businesses.

Towards that end, it is worth mentioning that we do not want to look at products which are aimed at the service provider (millions of POP/IMAP mailboxes) or at specialized vertical markets such as higher education, because we believe that the requirements for these products will be very different from the ones we want to focus on.

As in all Network World tests, we will be combining objective results, such as performance testing and interoperability testing results, with subjective evaluation of the features, manageability, and usability of the products.

Our performance testing will use common industry standard benchmark tools. Our interoperability testing will use MUAs from a variety of open source and commercial operating systems.

Our primary goal is not to rank products (although we will do that), but to offer our readers an intelligent discussion of the features that differentiate products, and to point out critical issues in evaluation of this product category. We also want to share the results of our testing with readers, so that they can shorten their own buying cycle by not having to start from scratch when evaluating products.

METHODOLOGY:

Products submitted to this test will be evaluated using the nine main criteria in this section.

Client and Mobility Support

We believe that compatibility with Microsoft Outlook (and Microsoft Entourage) is critical for any product in this marketplace. Therefore, compatibility with Microsoft Outlook is an important criterion. In addition, we will look at a broad base of MUA support including common open source and commercial products, as well as unusual MUAs that might be used on mobile devices.

We will look at multiple access protocols, including POP, IMAP, and MAPI.

In the area of mobility support, we want to look at support across a wide variety of client platforms, including Apple's iPhone, Palm's Treo, Microsoft's Windows Mobile, Symbian.

It is not our goal to exhaustively try every single operating system, client, and synchronization scenario. However, we will try and focus on some of the most common ones, especially those we expect to see in mid-size organizations.

Basic Feature Set

We expect that any enterprise email system will be much more than a message store (MS), so we'll be looking for the presence of calendaring and directory tools. These go along with the client and mobility support, where synchronization between calendars, email, and directory is an expected part of any "email" system.

Although not every enterprise looking at Exchange alternatives will be using Active Directory, we expect that most will and so we will look for integration with Active Directory for user information as a minimum feature. Additional directory integration tools will be evaluated if they are present.

Extended Feature Set

Most email systems include, as part of their 'big picture,' additional functions, including anti-spam, anti-virus, and web-based email access. We do not necessarily believe that these must be included in any product in this test, but if you do have these features, we will evaluate the functionality.

If you don't include, specifically, anti-spam, anti-virus, and web-based email access, we will want to be sure that you can cleanly and easily integrate with external devices providing this functionality.

Other additional features, such as instant messaging servers, will be considered, but only where they directly complement the email system. Putting a firewall or proxy server into your email server may be a valuable feature for your customers, but we will be concentrating on messaging functionality and features in this test.

Gateways to other email systems, such as X.400 or other proprietary email systems, will not be part of this test.

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Scalability

While we intend to look at email systems aimed at smaller companies, this does not mean that these companies are all located in a single site and are happy running everything on a single server.

Even in cases where a single server is used, some features (such as single copy message stores and replication) will be of interest to almost any email manager.

We will look at support for various types of scalability, including multi-site scalability, multi-system/single-site scalability, and high availability configurations.

Manageability

Email management means more than creating and deleting mailboxes, and we will be evaluating the ability of these systems to meet the management needs in a broad spectrum of environments, including provisioning, problem solving, and reporting.

We anticipate looking at features such as performance monitoring, system error reporting, alerting, usage management message tracking, reporting, and centralized management.

Management evaluation is not a beauty contest for whomever has the slickest GUI, but we will be considering usability and complexity of the management system as criteria important to email managers and help desk staff.

One of the goals we have for this test is to generate some sort of TCO estimate, and we expect that management will play into a large part of that estimate.

New Media/Unified Communications

Any mailbox server can integrate with a voice mail system by having voice mail sent over using SMTP. We will look at how well email systems can step up their level of integration with other communications systems, such as SIP-based telephony systems, location/presence systems, and instant messaging systems.

Exceptionally fancy voice-focused features (such as auto-attendant or voice-access to email) are out of the scope of this test and will not generally be part of our evaluation. However, to the extent that these features integrate with the email aspects of your product, they will be discussed.

Compliance and Security

We intend to look carefully at the security of these email systems. Because these systems may be deployed as “all-in-one” configurations, many of these systems will be directly Internet-facing, for either inbound or outbound (or both). This raises significant security concerns, both for intrusion prevention and denial of service avoidance. We will evaluate security features focused on the network as part of this test.

Client-to-server communications, server-to-server communications, and message store security are also an important part of this test. We will look for strong support for industry-standard features (such as TLS encryption), and will evaluate other security options (such as encryption or message authentication, to the extent that they complement client-side security) as well

Compliance concerns are likely to be less important than in large enterprises, but we believe that even very small business have both compliance and legal discovery concerns. We will be evaluating how well these systems handle specific functions such as email archiving (or, more commonly, capture of messages to be sent to a third-party archiving package) and other tasks related to compliance and discovery.

Migration Tools

We believe that most enterprises considering these products will already be running Microsoft Exchange and want to migrate their existing message store, calendar, and possibly directory to a new system. Migration tools and documentation to assist in migration will be important to these enterprises, and we’ll look at how burdensome a migration would be from Exchange to each of the systems in this test.

Performance

We don’t want to turn this test into a head-to-head performance slugout, but we know that email managers will be interested in seeing comparisons between products and platforms.

We will attempt to benchmark systems (all using a common hardware platform) for both MTA performance and MS performance. Depending on resources available, we may also include anti-spam performance as part of this test.

ADVICE ON WHAT TO SEND:

Our test bed will have Intel-based multi-processor servers with 6Gb memory, SAS SCSI drives configured on a RAID controller, and will use copper Gigabit Ethernet adapters. You are welcome to use our servers, and we would prefer it unless you sell a hardware appliance.

The choice of operating system is up to you if you use our servers. We have available, in house, Windows 2003 and Windows 2008 (Active Directory as well), along with common free Unix distributions, such as Centos Linux, and Solaris. Please specify which you would prefer. If you **only** run on Mac OS X, you probably are not right for this test.

If you sell an appliance, you should send an appliance sized for 500 moderate email users.

If you deliver your product on VMware, we can test it using VMware as well. However, you should only ask us to test on VMware if you have performance optimized your product for VMware. Otherwise, it may perform poorly in our performance tests.

We ask that you send physical product (on CD or DVD), even if you don't commonly do that, so that we can be sure we are testing the exact version you intend to be tested.

For licenses, please err on the side of generosity and license the product fully for all features you support for the period from delivery for at least 180 days. "All" in this case means "everything."

We will return all hardware to you at the earliest opportunity, which is normally after the test is printed.

ACTION ITEMS FOR YOU:

If you would like to participate in this test, we will need the following from you:

- 0) An expression of interest. Please let us (both me and Christine Burns cburns@nww.com, the Network World editor working on this project) know if you are interested in participating at the earliest opportunity before 15-September. If we have more submissions than available testing slots, early responses will be given priority.
- 1) Product. You should have a copy of your product delivered to our labs on or before 15-October. Please see notes above on "What to Send."
- 2) Pricing and ordering information. For reasons which are never clear, vendors often forget to tell us what the product is "officially" called, what version we are testing, how much it costs and where to buy it. For pricing, provide prices as tested. If you have additional software options, please provide pricing and nomenclature for these options. Please help us out by remembering to include

this. We also know that subscription fees can be complex to explain, but you must include support costs for your product, including any subscription fees, to help us calculate expected total lifetime costs.

- 3) Contact information for you. We need to know the following: Who the PR contact is, along with voice number and email address. Who a technical contact is, along with voice number and email. (Note: This information will not be published.)
- 4) Screen shots/product shots. Don't send those unless we specifically ask for them. Network World does not run these very often, so it's better not to waste time and effort mailing them around.

DATES:

Our target date to being testing is approximately 15-October. Your product should be in our hands by then. If this closely coincides with a software release and you need a week or two of leeway, please contact the author. Because we can't test everything at the same instant, it is generally possible to accommodate you. If you want any hardware back, send along appropriate shipping instructions with airbill numbers. Anything without this information will be treated as a loan (not a gift) to our labs.

The publication date is not yet set, but we are aiming for early Q1 2009.

INSTALLATION:

No, we do not want you to send someone out to install the software/hardware, unless you always do that for all your customers. However, we would like to be able to call technical support for questions so that we appear as an ordinary customer. We would prefer to not call your PR or Marketing people to get technical support.

CONTACTS:

I will be doing all of the testing and writing here in Tucson, under the close supervision of Christine Burns, Test/Reviews Editor, Network World. You can contact her at cburns@nww.com. My email is jms@Opus1.COM, my phone after March 1 is +1 520 324 0494 x101. If you actually want to talk to me, please send email.

SHIPPING ADDRESS:

The shipping address for everything is:

Joel Snyder

Opus One
1404 East Lind Road
Tucson, Arizona, 85719
+1 520 324 0494

Someone is here to receive packages every day, even if I am not in the office.

FAQs:

After writing a lot of testing based articles on this and other topics, I thought I'd save some time and share some common questions and answers with you.

Q1: Our software will require you to call some support line that is only open from 9AM to noon, Eastern Standard Time, to get a serial number to unlock it to make it work. Is this OK?

A1: No. Because of the nature of testing, we do a lot of it at odd hours and on weekends. If we get your product out of the box and suddenly discover that it won't work without some magic key that takes 12 to 48 hours to get, this can throw things off. Please make sure that anything needed to make your product work is in the box you send us.

Q2: We think that you're incompetent and want to send one of our engineers to configure the software so that you can understand its cosmic wonderfulness and harmonic goodness. Is this OK?

A2: Only if you absolutely insist, or if you always do that for all of your customers. Have your engineer send me email and we'll work out a mutually acceptable day.

I acknowledge that these are expensive and complex products and your on-site assistance can be more efficient and help to get a clean installation. However, sending a team of people down here to explain your market positioning and strategy is not allowed. If you do, be aware that it'll be about 105 degrees outside in Tucson, and we'll park those people outside so they can talk on their cell phones and read their email without bothering us.

Q3: We have a new version of the product coming out and want to send you beta stuff. Can you ignore any crashing-and-burning behavior?

A3: No. What you send us will get tested as if it is a released and supported product. We will be happy to test late betas if the product will be released by the time the test is printed. We will only look at one version of your product.

Q4: Our software is on the Web! All you have to do is click on ...

A4: No. Send us a shrink-wrap version of your stuff. This is important because then everyone knows that we're testing the correct version of the product that matches the hardware you've sent.

Q5: Our documentation is online! All you have to do is click on ...

A5: Well, OK, but we would prefer getting a hard copy (unless you never, ever do that) if possible.

This doesn't mean that you can get away without on-line help (preferably context-sensitive on-line help), just that you can't make that your only way of documenting your product.

Also, be aware that anything that isn't in the documentation will be assumed not to exist. If you don't put it in the documentation, we will not go looking for it. In other words, we expect you to document your product in the documentation, not in a search engine.

Q6: I don't want to tell you how much it costs. Is this OK?

A6: Sure, so long as you don't mind us telling people it costs \$92,000 per user per year, once your support costs and subscription fees are factored in.

Q7: We only want to be tested if we get top billing. Can we call you and have 9 people crowded around a speakerphone quiz you for a couple of hours about your methodology so we can predict whether or not we're going to win before we send the stuff?

A7: No. Your feedback on proper testing methodology is always welcome and any ideas you have on how to fairly compare products with disparate design goals is very useful. Besides, I'm a bit deaf and can't hear through your speakerphone.

The subjective test methodology generally changes form as we look at products. In most cases, products are tested three times: once with a first pass, once again after we learn what the bugs are in our testing, and a third time just to make sure that we have all the facts right. I don't believe that I can design a perfect test before ever looking at the products, and I don't believe that it's in your best interest for me to lock down the test before seeing the nifty new features which you've added since I last looked at them.

Q8: Should I send you <x>? (<x> is usually a white paper, competitive review, or explanation of why everyone else's product loses big)

A8: Yes.

Q9: I have this marketing manager who wants to chat you up for a couple of hours on his car phone while driving home. This will make you like us better and be less likely to tell people our product is subpar. Plus, it's a good way to pass the time while stuck in traffic. Can I have him call you?

A9: Please don't. The deadlines on this test are very tight and such conversations, while often interesting, generally are a waste of time. However, we are always willing to answer emailed questions at any time.

Q10: Will you tell us who else is in the test?

A10: "The usual suspects."

Q11: I cannot possibly make your deadlines. Can you completely rearrange your print schedule because some dweeb in our company lost the invitation and didn't get it to the right person (or: we didn't think it was important so I didn't read this until too late)?

A11: No. Someone decided months ago that there would be a test of this product now and not in December. I'm not allowed to revisit that decision. I understand that this can mean that significant lacunae will be present in the product lineup, but that's the way the presses run.

Q12: Can I call you every few days to see how things are going?

A12: Yes. In fact, this is not a supremely bad idea. However, you should not be insulted if no one takes your calls or calls you back. Generally, this means that things are going fine. Your success rate for status reports will increase approximately 1000% if you use email instead of the phone.

Q13: Can you be bribed?

A13: Unfortunately, no. You are welcome, however, to put me on your Christmas gift list for chocolate chip cookies.

Q14: If I leave my <hardware>/<software> in your lab after the test, will that positively affect the outcome? (Alternatively: if I insist that you return the <hardware>/<software>, will that negatively affect the outcome?)

A14: No.

Q15: Our product doesn't fit in the test, but we'd love to have you write a sidebar just about us. Should we call you a lot to discuss this idea?

A15: No. If you have ideas on other interesting sidebars, call the editor and talk her into it. Hint: she probably won't call you back.

Q16: We think that we're not going to participate because of <X>. Do you have a problem with that?

A16: No, of course not. However, this is Network World, the closest thing we have to a "journal of record" for product testing in network security, and it is important to us that our tests be seen as credible and complete. This may mean that we will test your product anyway, if its absence would be a significant gap.

Q17: I realize that your email address and shipping address are in this invitation, and they're at the bottom of your email messages, and they're on your web page, and they've been the same since 1989, but I still want to verify that I have the address right. Who should I contact?

A17: Let me think about that and get back to you.