

Migration to Zoho Workplace

A guide to a seamless transition to
Zoho Workplace



Why this guide matters

Switching platforms is more than a technical task, especially when it comes to critical functions like email. It's a strategic decision for your organization's future. Whether you're chasing better value, greater privacy, and an integrated ecosystem, or you simply want a email and collaboration suite that grows with you, Zoho Workplace offers a unified, business-ready alternative to your existing system.

This guide isn't just about how to make the switch. It will give you a clear sense of what to expect, how to prepare, and what you'll gain once the transition is complete.



What is Zoho Workplace?

Zoho Workplace is a complete email and collaboration platform built for modern teams. At its core, it brings together business email, document management, office suite, team chat, calendars, and meetings—all under one roof.

Imagine having your mail, your files, your shared conversations, and your collaborative documents working together smoothly—without having to stitch different apps and licenses together.

That's what Zoho Workplace delivers; a robust digital workplace platform that feels familiar yet streamlined. More importantly, Zoho puts strong emphasis on data privacy, secure email hosting, and administrative control, while keeping licensing predictable and cost-effective.

What you need before you begin



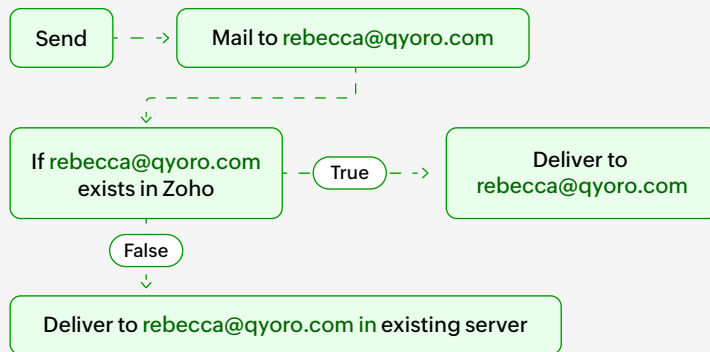
Before starting any migration, it helps to have a thorough understanding between your IT team and leadership about expectations and readiness.

Make sure you've verified ownership of your domain. This lets Zoho host your business email addresses under your company's identity. You'll also want to prepare all user accounts in the Admin Console so that when data arrives, it has a place to live.

From the source side—whether Google Workspace or Microsoft 365—you need sufficient administrative access for Zoho's migration tools to connect and import emails, calendars, and contacts.

Pro tip: Most of the teams also do a quick check of their mailbox sizes, shared calendars, and active user lists. This helps plan how long the migration will take and how to group batches of users.

Migration options and delivery models

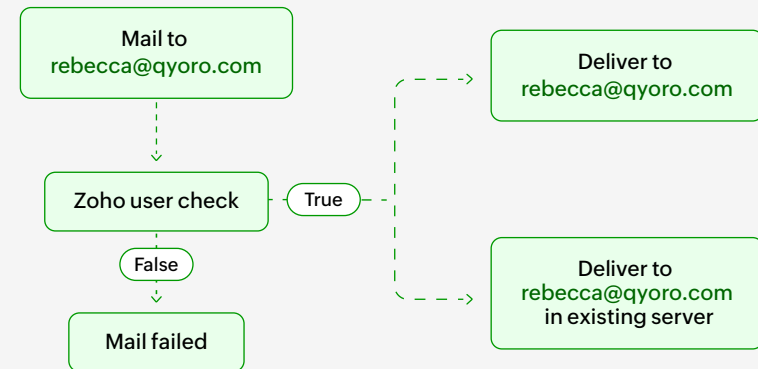


Split Delivery

Split Delivery lets you route new incoming email to Zoho for certain sets of users, while others still receive mail in your existing system. This means you can migrate people in batches rather than all at once, which gives teams time to settle in.

assuming Mx is pointed to Zoho.

Just like every business is different, every migration happens in different ways based on the business's requirements. There are multiple ways to manage the flow of email and data while you're in transition, and your choice depends on how much overlap you want between existing and new systems.



Dual Delivery

Dual Delivery, on the other hand, sends incoming email copies to both Zoho and the existing system. This is especially useful in pilot phases or when you want a safety net while you confirm everything is working correctly.

assuming Mx is pointed to Zoho.

These options give you the flexibility where you aren't forced into a "one-go" switch—unless that's what your timeline demands.

How the migration process works

Migrating your emails

A typical migration journey has several stages, and each one has practical checkpoints to help your team stay on path with control.

Step 1

Sign up for Zoho Workplace and verify your domain. This creates the foundation for your new email and digital workplace environment.

Step 2

Create user accounts, either one by one or in bulk, so every person in your organization has a corresponding Zoho account.

Step 3

Zoho's migration wizard lets you bring your existing emails, calendars, and contacts into Zoho Workplace in a secure and organized way. These tools support popular platforms like Google Workspace and Microsoft 365 directly, saving you from manual exports and imports.

Step 4

You can now start importing data to Zoho Workplace. After migrating and validating all the data, you will update your domain's mail routing (MX records) to point entirely to Zoho. This completes the cutover and ensures that all incoming mail lands in Zoho Workplace.

Pro tip: During this phase, many organizations choose to start with a pilot group, preferably with employees across different teams. This helps the company to confirm that data maps into Zoho smoothly and that users can access their email and calendars without disruption.



Transitioning the UpStack community to Zoho Mail was a smooth experience. The email inbox migrator provided by Zoho Mail was remarkably straight forward and user-friendly, greatly facilitating the entire process.

Yossi Mlynsky,
UpStack

Migrating your documents

Email may sit at the heart of your digital workplace, but your files and shared folders are just as vital to everyday operations. A complete migration ensures that your teams don't just receive their emails in Zoho, but can continue working without interruption across files too.

Your organization's files, stored in Google Drive, OneDrive, or other systems—can be moved to Zoho WorkDrive in a structured way.

Step 1

Identify how your current files are organized. Are they set up as shared drives, team folders, or individual ownership? This helps map your existing structure to WorkDrive's Team Folders, ensuring permissions and access remain consistent after migration.

Step 2

Set up your Team Folders in Zoho WorkDrive. These folders become the central spaces where teams collaborate, and should reflect your current organizational structure to maintain continuity.

Step 3

With Zoho's migration tools and supported import methods, data can be migrated to the new system. During this process, folder hierarchy and file structure are preserved to avoid confusion post-migration.

Step 4

Post migration, validate file access and permissions. This will ensure users and teams have the same level of access they previously had, especially for their shared and collaborative documents.



Zoho WorkDrive gave us what Google Drive couldn't: team-level storage, more space, better structure, and streamlined external sharing.

Pratik Khadloya,

Enthusiastic India Online Services Pvt Ltd

Once completed, your files and folders are centralized within Zoho WorkDrive, providing instant access to documents, enabling real-time collaboration, controlled sharing, and better visibility across teams.

Pro tip: Many organizations choose to migrate documents in phases, starting with active teams or departments. This reduces risk and allows teams to get comfortable with Zoho WorkDrive before fully transitioning.

Migrating your team conversation

No migration is complete without team communication, the space where daily collaboration actually takes place.

While email and files can be migrated directly, chat platforms typically require a slightly different approach. As chats are platform dependent, context heavy and involves high volume, this involves a setup + transitioning strategy.

Step 1

Review your existing communication structure in Microsoft word or Google Chat or Slack—from channels, teams, to user groups. This recreates a familiar setup for users in Zoho Cliq.

Step 2

Use the Admin Console for user provisioning in Zoho Cliq. Once done, users can be automatically added based on your organization's directory.

Step 3

Create channels in Zoho Cliq that mirror your existing teams, departments, or other groups. This helps users transition without needing to relearn communication flows.

Step 4

Finally, onboard users to Zoho Cliq. Nudge them to start active conversations within the new platform.

Pro tip: Businesses export and archive historical chat data from their previous platform for compliance reasons or as a backup.



We felt that our data was unsafe with our previous communication application and the cost was a bit high. So, we were looking for a more trustworthy and cost effective communication platform, and that's the reason we switched to Zoho Cliq.

Aktar Sadat,

RCM-Senior Manager, FHRM LLP

Support and continuity

A successful migration isn't just about moving data. It boils down to preserving how teams work. In order to make it helpful for people across the company, consistent communication is the key. Conveying clear expectations, milestones, and instructions goes a long way toward a smooth migration experience.

Post migration? Monitor user adoption and engagement. Address gaps, refine structures, and ensure teams are comfortable using the apps for their day-to-day communication and collaboration.



What you get moving to Zoho Workplace

Once your migration is complete, you'll find that your business email, calendars, files, and collaboration tools are accessible in a single ecosystem. You'll no longer need to juggle separate licenses for email, cloud storage, and document editing.

By aligning emails (Zoho Mail), documents (Zoho WorkDrive), and communication (Zoho Cliq) within a single ecosystem, organizations eliminate fragmentation. Teams no longer need to switch between disconnected tools.

The result is a workplace where everything, right from conversations, files, to communication works together from day one.

Zoho Workplace also helps you with security and compliance. Administrators can define retention policies, manage access controls, and apply email safeguards—all from a centralized console.

Decision makers will appreciate that many organizations find significant cost savings after the switch, thanks to predictable and transparent licensing and a comprehensive set of built-in tools that reduce the need for third-party apps.



With Zoho, I'm confident in scaling up. I don't have any doubts about their longevity; they're here to stay and destined to become even bigger players. As they consolidate their tools, Zoho's going to dominate. And I'm pretty sure Zoho will emerge as the obvious choice for businesses out there.

Yossi Mlynsky
UpStack

Finally, the end users enjoy having everything in one place—their email, their shared files, their chats, and their calendars—which can reduce friction in day-to-day work and increase overall productivity without added complexity.



Zoho Workplace has enabled us to achieve remarkable productivity gains, with our IT admins experiencing a **60%** improvement in their efficiency. This has translated into significant time savings, and the cost savings have been equally impressive, with close to **40%** reduction in expenses.

Dhanasekaran
Belstar Microfinance

Conclusion

Making the leap to Zoho Workplace is an opportunity to simplify the way teams work together. With the right guidance and approach, businesses can improve communication, streamline productivity, and adapt confidently to the modern workplace.

If you'd like help at any stage, whether it's planning, execution, or post-migration support, our **Migration Assistance Program (MAP)** is designed to help businesses move from the current platform to Zoho Workplace securely, quickly, and with minimal downtime.

For more questions, feel free to reach out to us

✉ Email: support@zohoworkplace.com