

Shared Mailboxes vs. Forwarding Emails

Converting an offboarded employee's mailbox into a shared mailbox is more secure, more compliant, more collaborative, and more operationally efficient than forwarding email.

Forwarding should only be used in very rare, temporary situations (e.g., technical limitations or extremely short-term coverage).

Feature / Benefit	Shared Mailbox	Forwarding
No license required	✓	✗
Access to historical mail	✓	✗
Compliant w/ retention & auditing	✓	⚠
Supports shared access	✓	⚠ limited
Avoids mixing mail with manager's inbox	✓	✗
Supports auto-reply, rules, and Send-As	✓	✗
Reduces data leakage risk	✓	✗
Standardized offboarding workflow	✓	✗

1. No Licensing Required for a Shared Mailbox

Once converted to a shared mailbox, you can remove the M365 license, reducing cost. Forwarding still requires the mailbox to exist as a licensed mailbox, unless you delete it (which eliminates historical data).

2. Full Access to Historical Email

Forwarding only gives access to new incoming messages after offboarding. Shared mailbox access provides:

3. Better Compliance, Auditing, and eDiscovery

Shared mailboxes support:

Retention policies

Litigation hold

eDiscovery searchability

Audit logging



4. Maintains Transparency Across the Team

Multiple people can be granted access:

Manager
Team leads
HR
Successors

5. Supports Auto-Responses and Routing

Shared mailboxes can have:

Auto-reply (“This employee is no longer with us...”)
Rules for sorting or tagging
Shared send-as and send-on-behalf

6. Cleaner Separation of Duties

Forwarding mixes the former employee’s mail with the manager’s inbox, creating:

Clutter
Risk of accidental deletion
Difficulty in auditing who viewed what

7. Easier Offboarding Workflow

Standardizing on shared mailboxes makes IT operations simpler:

Convert mailbox → Remove license → Grant access
No need to maintain mail flow rules
Easy to disable access later

