

Case Study: Financial Services HFMC Wealth - Exchange 2013 to Office 365 Migration

As part of their digital transformation initiative, leading Investment Wealth firm HFMC needed to modernise their legacy on-premise Exchange 2013 environment, in order to deliver enhanced functionality and superior productivity to their 105 users. As HFMC Wealth's long-term strategic technology partner, Krome were instrumental in the recommendation, planning and phased hybrid implementation of the Office 365 migration.

HFMC Wealth

HFMC Wealth Limited, with offices in Weybridge and London specialises in delivering financial planning and wealth management advice, acting for over 1,000 individuals, families, businesses and trusts nationwide. Having recently been ranked in the Top 25 Financial Advisors in the UK by the Financial Times and awarded Corporate Chartered Financial Planner status by the Chartered Insurance Institute, accolades such of these demonstrate their high degree of technical knowledge and capability.

The Requirement

HFMC's email platform was operating on an on-premise version of Microsoft Exchange Server 2013, which entered extended support back in April 2018; this end of support signified that, whilst the security updates would continue, there would be no additional feature updates released.

HFMC's users started to report functionality issues, such as cross device email management issues, or loss of previous functionality, such as dictation, a function that was commonly used by one of the Directors; these issues were causing frustrations and having an impact on productivity across the business.

During their annual IT strategy review with Krome in Feb-2020, the alternative solutions were reviewed, such as upgrading their on-premise platform or migrating their environment to Microsoft's Office 365 cloud solution. An updated solution needed to be in place and completed by August 2020 before their current Microsoft licenses expired.

Shortly after the February review and subsequent project sign-off, Covid-19 emerged, causing unexpected challenges for us all.

Key Solution Highlights

- 140 Mailboxes Migrated
- Hybrid Exchange co-existence and connectivity to Office 365
- Microsoft Authenticator replaced previous 2FA solution, reducing overall costs
- Veeam Cloud Backup for Microsoft Office 365

Customer Details

Financial services and wealth management with approximately 105 employees.

Business Challenge

Out of support Exchange environment causing functionality issues and poor user experience.

Benefits Experienced

- Increase in productivity and staff satisfaction
- Instant upgrades and access to new features
- Cost savings for combined licensing
- Applications and data available across all devices
- Data retention & compliance
- No downtime or disruption to service for users during migration

“Krome people are very approachable, the most approachable I've ever worked with, we know that in a time of crisis we can lean on them.”

Ms Stephanie Whiting, IT Manager, HFMC Wealth

COVID considerations

The timing of the project unfortunately coincided with the Covid outbreak as Stephanie Whiting, IT Manager explains, “we had our initial budgetary discussions early February, with sign off by the end of February, and the required completion date of August, obviously we were oblivious to the worldwide pandemic that was about to hit, but we knew that the project was still going to have to somehow go ahead regardless.”

Despite the challenges and restrictions of Covid, the project was completed by Krome remotely and within the required timescales, Stephanie commented: “It was absolutely fantastic that you were able to manage the migration completely remotely. I think you had to come into the office, maybe just once, during the entire rollout.”

There were also special considerations taken to ensure that the staff who were all working remotely, were well supported during the migration. “Working with your project management team we ensured that specific users were migrated during allocated service days where we knew they had direct access to our designated seconded consultant. Although the best feedback that you can possibly get from users is that in many cases, they didn't even notice that there was a change!”

Hybrid/Office 365 Exchange Co-Existence

With the change in working patterns, with users now working remotely and often out of hours, a staged hybrid migration plan was adopted. Using this staged migration approach, we migrated batches of on-premises mailboxes to Office 365 over the course of 10 weeks. Initially starting with groups of 20 at a time, and increasing the numbers at the later stages, depending on user feedback or any issues experienced.

In order to achieve a seamless, but staged migration for HFMC users, we configured a hybrid deployment between on-premises Exchange and Exchange Online using Active Directory synchronisation to help with recipient administration.

This hybrid model gave users the ability to use the same user name password and domain name for logging on to both their on-premise and Office 365 mailbox, users that had already been migrated could still share/access calendar information with other on-premise users and vice versa, other hybrid benefits include cross-premises mailbox permissions, and overall it offers an organisation the flexibility of having the on-premise Exchange environment easily accessible during migration.

Improved Functionality & Productivity

The main and immediate improvements that were seen by the business were just simple things like the updates to functionality. Having been using an out-of-date version of Exchange for some time, HFMC users really noticed the value of having a product that is constantly updated, as Stephanie explains: “All of these niggly little issues, things that we had been trying to find a fix for some time, all just seem to disappear once we had migrated. Office 365 is obviously constantly kept up to date by Microsoft, they are regularly patching issues or making enhancements, which has made a huge difference.”

Users have seen an improvement in productivity as a result of the new features available, the dictation functionality for example, is now being widely used by the advisors, saving critical time. The advanced settings and rules, that can be applied on mailboxes and having the ability for users to see their focused mailbox has also been extremely well received: “Having the ability to change mailbox views and manage tasks is brilliant, because that's all added functionality we just didn't have before, and it has really helped people manage their inboxes. Whilst they had rules before, there is now all of these different options, we have had lots of feedback to say it's increased their productivity.”

Cost Savings

When comparing the cost of upgrading their on-premise Exchange environment or moving to an Office 365 model, several cost considerations were made, not only for the hardware and ongoing maintenance costs of running an on-premise solution, but also the additional licensing requirements HFMC needed, for SharePoint and Windows Enterprise. The all-inclusive licensing model of Office 365 meant that they had access to the other applications within the O365 tool set, applications such as Microsoft Authenticator for example, which also enabled HFMC to retire their old 2FA tool, saving them money in licensing costs and gaining improvements in functionality.

Cloud Backup with Veeam for Office 365

With data retention and compliance being critical in the financial services industry, with records being stored for many years, HFMC opted to ensure their Office 365 data was securely protected using Krome's Cloud Backup for Office 365 service, giving them the ability to set longer data retention periods, and allowing them quick and secure access to their data: “Whilst we haven't needed to access files yet, we are safe in the knowledge that the data is protected and easily available,” stated Stephanie.