

**CASE STUDY: PROFESSIONAL MEMBERSHIP CLUB**

**MIGRATING A GLOBAL ORGANIZATION TO  
THE CLOUD WITH MICROSOFT 365**

**OVERVIEW**

The client is a global, independent membership club made up of more than 72,000 of the world's leading insurance and financial services professionals. Founded in 1927, this organization represents individuals from more than 500 companies and 70 nations. Hosting conferences year-round, they provide networking opportunities and online resources for members, helping to them to succeed in their respective industries.

**THE CHALLENGE**

The organization had 12 terabytes of content, much of which was large video files. To share and distribute this content, the organization officially relied almost exclusively on Virtual Private Networks (VPN) and file shares. This created challenges for their IT department, having to grant permissions directly to users so they could access important documents and information. This led users to implement their own solutions, storing files on third party platforms like Dropbox and Google Drive outside of IT oversight. Instead of continuing to manage all these varied and patchwork solutions, the client sought a single, unified cloud solution to address their content and database challenges.

**TECHNOLOGIES USED**

**AZURE VIRTUAL  
MACHINES**

**WINDOWS  
SERVER 2008**

**POWERSHELL**

**SHAREGATE  
DESKTOP UTILITY**

**ONEDRIVE  
FOR BUSINESS**

**MICROSOFT  
TEAMS**

## SOLUTION

The client tapped Planet Technology for an analysis consulting engagement to get a sense of the scope of a cloud migration.

Working closely with the client organization's IT department, Planet Technology's Microsoft 365 team discovered that the 12TB of content included 4TB of duplicate content across their personal file shares. This was a massive cost-saving discovery as it related to the amount of cloud storage the organization would be paying for after migrating.

Satisfied with the results of this engagement, the organization doubled down and contracted Planet Technology's Microsoft 365 team to conduct the cloud migration. Dropbox was initially considered, as some of the organization's general users were already using personal Dropbox accounts for sharing files. However, they were already paying for an organization-wide Microsoft 365 subscription, so it was ultimately decided that an implementation of SharePoint, Teams and OneDrive would be the most sensible option based on the usage and requirements.

Using the ShareGate migration tool, Planet Technology's Microsoft 365 team moved user's personal file share content in batches. As these migration batches occurred, Planet Technology provided training custom-tailored to each of the organization's departments. Planet Technology also trained the organization's IT department on managing the system throughout the course of the engagement. After tackling the largest of the personal file shares, Planet Technology worked with the organization to provide the necessary resources to enable remaining users to migrate to OneDrive for Business on their own.

In total, 8TB of content was migrated over the span of two months and ahead of schedule. This enabled Planet Technology to start the migration of the department and team file share content earlier than anticipated.

## RESULTS



**UTILIZED  
MICROSOFT  
365 TOOLS**

Eliminated cost of third-party storage and collaboration tools

**IMPROVED  
TECHNICAL  
EXPERIENCE**



Major improvements organization-wide



**REMOVED 4TB  
OF DUPLICATE  
CONTENT**

Resulted in significant storage cost savings

**CENTRALIZED  
STORAGE  
PLATFORM**



Improved organization-wide collaboration and streamlined role of client IT department



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(888) 845-2539



+44 (0) 203 868 1000



PLANET-TECHNOLOGY.COM