# OFFICE 365 MIGRATION & SUPPORT
## FOR ACA COMPLIANCE GROUP (ACA)

ACA Compliance Group (ACA) is a leading global provider of governance, risk, and compliance advisory services and technology solutions. The company needed help reducing the complexity of IT infrastructure management, increasing the availability of email services following a major email service outage due to their on-premises solution, and migrating emails from multiple business units into a single Office 365 tenant. In addition to the migration support needed, they required a thorough evaluation of the tools and features available in the O365 Suite that would best serve the ACA team and its customers. This would help define a catalog of services that would be approved and supported by ACA's IT department for current and future business units.

## Challenge

ACA Compliance Group was facing periodic downtime on their on-premises Exchange environment and needed to quickly migrate to a cloud-based service. Faced with a tight timeline and a lack of internal expertise to tackle the migration and ongoing support, they turned to AIS. The organization was also interested in adopting other components of O365, including Teams and SharePoint Online. As a top-tier Microsoft Partner focused on enterprise cloud transformation, AIS was able to provide ACA with a single-vendor solution for all their needs.

## Solution

The strategy was to first migrate to Exchange Online to stabilize availability of their mission critical email system, and then begin adoption of Teams and other O365 components.

We often begin post-migration support while migration is still underway by transitioning the newly migrated O365 solution into an ongoing operations & maintenance mode using our suite of support offerings – transition, proactive, and reactive.

A comprehensive process for transitioning into support is crucial for a smooth delivery of support services. AIS' transition methodology uses the following repeatable activities to ensure a successful hand-off to the support team, and an ability to deliver valuable and effective management and support:

- **Kickoff –** Affirmation of scope, support scope and service boundaries, ticket severity/priority definitions, Service Level Agreement (SLA), and Support Incident Workflow.

- **Project Management Information Management** – There are several bits of information related to project management that are crucial to track in a centralized location, both for ease on collaboration as well as to ensure data integrity and accuracy. Through knowledge transfer sessions with ACA's staff or AIS' implementation team, AIS gathers and documents the following:

- **Project Resources** – Online collaboration sites, requirements documentation, test scripts, etc.

- **Names, URLs, and the purpose of various tenants**

- **Credentials –** Account types required for accessing various assets such as O365 tenant(s), Azure Portal, etc.

- **Key Personnel –** Both from AIS and ACA.

- **Technical Overview** – To provide informed and effective reactive support in the most useful manner possible, it's important for the AIS support staff to know the full landscape of the managed environments and particularly how they fit into the overall enterprise. AIS meets with our implementation team and ACA staff to learn and document their O365 tenant hierarchy.

- **Service Catalog** – Prior to the start of delivery of support services, AIS learns ACA's procedures for expected types of reactive service requests which are then incorporated into a service catalog. Each service catalog item outlines the SOP to be followed and the expected SLA along with roles and responsibilities between AIS and ACA for each step of the given SOP.

- **Baseline Transition Document** – This document will be maintained by AIS as a team operation guide as baseline configuration items are added, removed, and changed.

- **Help Desk Portal** – AIS offers a secure help desk portal to ACA points of contacts with phone, email and web form channels for submitting requests, as well as a knowledge base containing any runbooks defined as part of transition.

- **Report Template** – AIS management works with the ACA project management team to define a monthly written report template.

As part of the transition phase, AIS works directly with the implementation team and/or implementation artifacts to learn our clients' systems to the extent required to deliver on support services. The baseline transition document is the key output of this phase and outlines the team's operating guidelines. After transition, AIS begins performing proactive and reactive services on an ongoing basis.

## Proactive Services

- **Monthly Status Report –** AIS produces a written report using the agreed upon template and/or conducts a status meeting (typically monthly).

- **Monitoring & Alerting** – AIS utilizes O365 tooling to monitor and alert our support staff (and optionally Client staff). Our monitoring and alerting seeks to notify us of issues before they are discovered by end users.

### Reactive Services

- **Support Incidents –** Throughout the term of support, AIS stands by 24 x 7 x 365 for support through the use of either a blended onshore/offshore staff or dedicated US-only staff. The basis of our reactive support are SLAs on response times. Response times are tailored for each client's needs and based on a table of support hours, severities, and severity criteria. Example below.

| Severity | Description | Response Time Target |
|---|---|---|
| Severity 1 | System is non-operational for an entire group of users.<br><br>System problem impacting a key deadline or other mission critical feature. | Response within one-half of a *support* hour. |
| Severity 2 | System is non-operational for some users.<br><br>System defect affects multiple users. | Response within 8 *business* hours. |
| Severity 3 | All other issues. | Response within 24 *business* hours. |

## Results

After leading the ACA team through a successful migration to O365, AIS has continued to support their current systems and goals for modernization for several years.

ACA Compliance Group now has peace of mind knowing, as they continue their O365 adoption journey by adding more O365 features, AIS has the capabilities to support them for the long haul. AIS has led ACA, who started with just Exchange Online, in their expansion into Enterprise Mobility + Security, Project Online, Visio Online, Teams, Audio Conferencing, OneDrive, Planner, and Power Automate.

Achieving their goal of consolidating various business units under one tenant, they continue to expand their user base with each acquisition. Additionally, AIS procures and maintains multiple other tenants for ACA's IT and other business units to use as 'sandboxes', testing features not yet supported by the firm on their main tenant.

AIS provides all of this support for one monthly fixed price fee based upon the size and complexity of the environment supported, number of end users and estimated volume of support requests. This gives ACA the benefit of predictable operational costs through their cloud transformation journey.