

# M20

## Migration to Office 365

- > Credito Fondiario S.p.A
- > Banks and Insurance



Italy

*The decision to entrust the project to a specialized partner has allowed us to concentrate on our core business. The results exceeded all our expectations and we are now testing how to expand Office 365 functionalities to implement new compliance and security features, according to GDPR.*



*Fabio Trivellone – ICT Manager*

<b>BRIEF OPTIMIZATION (SAVE MONEY)</b>	Complexity Reduction and lower management costs.
<b>Partner</b>	Proge-Software S.r.l.
<b>Scenario</b>	Credito Fondiario is an independent bank, Italy’s market leader in the Debt Servicer & Debt Purchaser segment (investment, management, portfolio management, credit servicing and performing and non-performing loans). Credito Fondiario provides its products and services to other banking and financial institutions as well as to international institutional investors specialized in the credit sector.
<b>Business needs</b>	Operating in a very dynamic and competitive market, the management has deemed crucial to focus maximum resources and investments on the core business, delegating the supervision of the collaboration infrastructure to a specialized operator.
<b>Products</b>	Office 365 Enterprise E3 – Exchange on line - One Drive for Business – Skype for Business – SharePoint.



## SUMMARY

E-mail infrastructure migration and Office automation, from the on-premise to the cloud version, called Office 365. The main phases of the project: Assessment, design, configuration of Office 365 services in hybrid mode for three e-mail domains, migration of e-mail boxes, Exchange 2013 disposal and Symantec Vault archive, training for system administrators and ongoing technical support.



## BACKGROUND

The previous infrastructure was based on Microsoft Exchange Server 2013 technology with mailbox storage on the Symantec Enterprise Vault; an important constraint was managing the transition phase without interfering on company productivity.



## THE CHALLENGE

Credito Fondiario wanted to support the earned leadership in its market, by increasing the employees efficiency allowing them to receive information on any device, in any place at any time. An innovative model to make more informed decisions and to gain a competitive advantage.



## APPROACH

The consolidated methodology that Proge-Software applies to achieve the agreed targets, is based on the following main steps:

- Goals, requirements and constraints identification (Vision);
- Analyzing the starting point and existing systems configurations (Assessment);
- Building the solution that best suits the customer needs, show it and test it together with the technological and business representatives to gather feedback and adopt the necessary enhancements and corrections (Build);
- Putting the solution into service and providing the necessary post-start-up support .



## EXPECTED RESULTS

Credito Fondiario commits to Proge-Software to quickly and efficiently implement the new solution, accompanying the company in this Digital Transformation phase that allows a new way of working thanks to innovative and highly productive processes.



## OBSTACLES AND PROBLEMS

Reconciling full services delivery with restrictive security policies. Planning the migration process considering the external storage component and the time required for its management.



## ACTUAL RESULTS

Credito Fondiario turns to Proge-Software to carry out a smooth migration, without impoverishing staff service levels. It was necessary proving immediate improvements, especially regarding the maximum levels of mailbox storage. The business case submitted by Proge-Software showed that the implementation costs would not exceed updating costs of an in-house solution, but rather, Credito Fondiario would benefit from a wider set of features despite a lower management costs.



## BENEFITS AND ADVANTAGES

Credito Fondiario has achieved the goal of having a complete, flexible, standardized Collaboration infrastructure, always technologically up-to-date and managed with high levels of quality and safety. The availability of new features and capabilities (for example, cloud storage for anywhere / anytime data access) has significantly improved collaboration and communication, inside and outside the organization, and reduced management costs.



## LIST OF KEY POINTS AND LEARNINGS

Management of the specific security needs of the Customer environment also common to other customers. Management of the migration process that includes data storage on third-party platforms.



## ADDITIONAL INFORMATION

Thanks to the fulfilling results obtained, additional Office 365 modules are being evaluated, among the main ones: native functionalities for Security & Compliance, Mobile Device Management, Search & Investigations.