

CASE STUDY

IT COST REDUCTIONS THROUGH MICROSOFT 365 MIGRATIONS



THE CUSTOMER

ShoreView Industries

INDUSTRY

Private Equity Firm

THE SOLUTIONS

Migration from a costly environment to a secure, nimble, and cost-effective Microsoft 365 environment

BENEFITS

- Significant cost savings
- Improved efficiency
- Reduced reliance on VPN
- Smart turn-down of legacy Exchange server
- Implementation of a modern, cloud-first architecture

INTRODUCTION

ShoreView Industries is a Minneapolis-based private equity firm founded in 2002. ShoreView has raised over \$1.3 billion of committed capital across four funds.

ShoreView invests in the middle market, across a wide range of industries. They've partnered with established family and

entrepreneur-owned companies across many sectors, including building products, industrial technology, plastics and packaging, aerospace and defense, business and professional services, life sciences, industrial distribution, niche consumer products, specialty materials, and residential services. Since its formation, ShoreView has invested in more than 150 companies.

THE OPPORTUNITY

Microsoft Partner

In early 2023, ShoreView's senior leadership team reached out to Atomic Data about opportunities to save money and ways they could take advantage of Microsoft 365 (M365).

Many of the ShoreView employees travel extensively and being tethered to a VPN became cumbersome. For years, ShoreView operated in a very secure and stable environment with their email and company files hosted in a virtual environment. However,

it was time to evolve and look for opportunities to improve capabilities and reduce costs.

ShoreView's Chief Administrative Officer Monica Stone knew it was something that had to be handled. "Costs had gone up dramatically over the past 10 years...we were spending more than we needed".

Like so many other organizations today, ShoreView made the

decision to migrate to M365. The cloud-powered productivity platform has proven to greatly enhance the productivity, security, and scalability of millions of businesses, all while providing a significant reduction in operational and licensing costs. It made the most sense for an organization that was looking to cut costs and reduce their physical server footprint.

"Costs had gone up dramatically over the past 10 years. We were spending more than we needed."

- Monica Stone, Chief Administrative Officer for ShoreView



THE SOLUTION

Minneapolis-based IT as a Service provider Atomic Data and ShoreView Industries began their relationship over two decades ago. ShoreView was in the market to partner with an IT provider who could support their mix of both Apple and Microsoft workstations, which was quite the challenge. "A lot of people wouldn't even touch us," remembers Stone.

From the very beginning, Atomic Data has deftly handled every technology project under the sun for their clients. "I appreciate our relationship. We need more hands-on service than other companies," commented Stone. Atomic Data's seasoned engineers are veterans of hundreds of migrations both simple and complex and had the skills necessary to guide ShoreView through this digital transformation milestone.

"It was a successful project and transition."

- Monica Stone, Chief Administrative Officer for ShoreView

After working with ShoreView to put together a roadmap and budget for the project, Atomic Data's Microsoft-certified experts went to work planning the migration and turndown of their legacy Exchange server, file server and IPS management system. Engineers put together a custom migration plan that made sense for ShoreView's schedule and organizational needs. The plan gave ShoreView an idea of what success would look like in the end. Atomic Data set out to migrate ShoreView's content from an internal file server to SharePoint Online Document Centers. The process was mapped, documented, and completely streamlined.

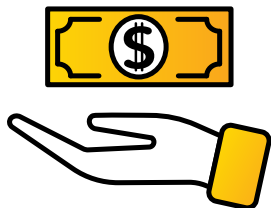
Atomic Data's experts made use of a powerful tool that the engineers mapped the migration plan to. Once the migration was complete, Atomic Data trained a select handful of ShoreView Industries employees who were designated as SharePoint stakeholders. These stakeholders, trained in the migration and setup, collaborated to create sound, accessible documentation relevant to all employees. The documentation included reporting, management, managing permissions, external sharing, OneDrive, Delve, and other SharePoint integrations, capabilities, and applications.



Ultimately, the work moving ShoreView to a cloud-first architecture allowed them to eliminate virtual server costs and move to per-user licensing for the majority of their services. Not only did this prove easier to calculate and maintain, but

it contributed to an overall reduction of their IT operations expenses. "We would say that it was a successful project and transition," noted Monica Stone.

THE NEW REALITY



ShoreView Industries hit their mark. Their goal was to modernize while reducing costs, and this migration was instrumental in making that possible. Their email and large file server were officially migrated on a Thursday night and it was business as usual on Friday morning. The day-to-day operations of ShoreView

weren't impacted during the migration. "Everyone was pleased at how it went," remarked Stone. Whenever a company wants to make a change like ShoreView did, it takes a lot of care and

precision to ensure that the project goes smoothly. Not only did Atomic Data's white glove service bring this precision, but it also brought cost effectiveness to the project.

ShoreView wanted to reduce costs in a specific and important timeframe, and Atomic Data's Microsoft experts were able to help them achieve this strategic objective – ShoreView Industries has decreased their annual IT expenditure by over \$60,000. "[Atomic Data] did a tremendous job.... There are significant cost savings."



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– Monica Stone, Chief Administrative Officer for ShoreView Industries

Ready to make the jump to Microsoft 365?

PLAN YOUR MIGRATION TODAY



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