CASE STUDY

MOVING SEAMLESSLY TO EXCHANGE ONLINE

OurFamilyWizard®

THE CUSTOMER
Our Family Wizard

INDUSTRY
Co-parenting app and services

THE SOLUTIONS
Minneapolis-based Exchange Online and Microsoft 365 migrations, professional services, 24x7 day-one support

BENEFITS

• Implementation of modern & flexible Exchange Online

• Removal of aging on-prem Exchange server

• Simplified user management

• Improved ticketing system

• Reduced internal IT demands

THE SITUATION

Our Family Wizard (OFW) has been in business for over 20 years, developing tools and applications that allow parents to peacefully and effectively raise their children after divorce or separation. Their relentless pursuit of positive change has made them a pioneer in their field, serving customers across the nation and around the world from their headquarters in Minneapolis, Minnesota.

Serving clients in so many different places and employing a dispersed workforce makes efficiency the name of the game. Like many organizations, Our Family Wizard had an on-premises email Exchange

server that they'd used since the company's beginnings in 2001. Yet, in recent years, OFW had been embracing a cloud-first strategy and layered Microsoft 365 into the majority of their business operations.

All except that pesky on-premises Exchange server.

ATOMICdata

Our Family Wizard has an exceptional IT team, led by manager Corey Steiner. Corey correctly deduced that continuing with the existing Exchange server wasn't sustainable, secure, or user-friendly. One of the issues that his team encountered was that they were using a shared user account as a sort of ticketing system, one that had been in use by the company for over two decades. As such, the team were forced into this inelegant solution of closely monitoring an aging inbox that regularly bogged down and became a challenge to use. This, in turn, necessitated an extra step in their routine, where they would need to spend time moving and archiving ancient emails to make room for the new ones that were coming in. Company resources were spending too much time maintaining the disjointed workflows in place, when they could be better serving their customers.

Archaic processes were rearing their ugly head by 2022. Of the arrangement, Corey Steiner said "It really felt like we were not in the modern era."

The decision was made that OFW would migrate their email to Microsoft 365 Exchange Online and then shutter its on-prem Exchange server. This isn't an uncommon pathway for a business to take – over 350,000 companies worldwide are using Microsoft 365 and Exchange Online to manage their email.

> **"It really felt like we were not in the modern era."**
> **- Corey Steiner**

However, it wasn't a venture that OFW's IT team was built to undertake. No two migrations are exactly alike, and often come with pitfalls and snags that are unique to each business. Ultimately, OFW couldn't do it on their own – they needed a trusted and local partner that could get the project done safely, correctly, and with minimal impact to business operations.

THE SOLUTION

Enter Atomic Data. Minneapolis-based Atomic Data is a Microsoft Solutions Partner and a proven veteran in making technology serve the needs of business. The company comes equipped with an arsenal of resources, including Microsoft-certified professional services engineers who've shepherded many migrations to Microsoft 365 and Exchange Online. What's more, the lights were always on at Atomic Data – going with Atomic Data meant that the project could progress, even on nights and weekends.

In short, it just made sense for OFW to partner with Atomic Data on this project.

First, Atomic Data had to configure an Azure Active Directory (AD) Connect for Exchange Hybrid. That meant determining licensing requirements and then configuring conditional access policies. Multi-factor authentication was put in place for all users and a policy to block legacy authentication protocols was added as well – all ensured by the establishment of new emergency break-glass accounts.

Secondly, the Exchange Hybrid server needed to be configured properly. The Sender Policy Framework (SPF) DNS entry was updated and Exchange Hybrid was installed. Policies and settings were configured for anti-malware, spam, and anti-phishing protections, allowing for the safe exchange of attachments and links. This is when the first migration tests began, where Atomic Data's engineers assessed Outlook connectivity to Exchange and bi-directional mail flow.

Then, a laundry list of necessary tasks were completed by Atomic Data to prepare OFW for the migration:

- Converted mailboxes not requiring a login to shared mailboxes

- Removed unused accounts and mailboxes

- Exported disabled mailboxes to PST files

- Excluded and/or deleted all of the disabled mailboxes

- Wrote Multi-factor authentication registration documentation

- Created mobile device setup documentation

- Assisted OFW's IT staff with MFA enrollment where necessary

- Configured conditional access policies and exceptions as needed

- Perform test migrations with test accounts, as well as trusted live user accounts

- Scheduled the migration in coordination with OFW's business needs

Batches of emails and accounts were then migrated, flowing incoming email through the Atomic Mail Filtering system directly to Exchange Online.

Support continued after the migration was complete. Atomic Data resources were on hand and available on day one, ensuring that OFW's first forays into Exchange Online went smoothly. Documentation was configured specifically for OFW's post-migration reality. Atomic Data also provided training on Azure Active Directory and Exchange Online to OFW's IT team.

This also included on-the-fly, one-off solutions to Our Family Wizard's unique workflow. At one point, Corey Steiner mentioned that their now-old email system had included an email reminder when end users'

passwords were set to expire. Atomic Data came up with an elegant replacement solution, a script that sent automated email reminders 14-days, 7-days, 3-days, and 1-day before passwords expired. It reduced the number of tickets OFW's IT team would get regarding password expirations. "I don't know if that was something most places would do…they had it whipped up in a day," said Corey.

Finally, with all the pertinent mailboxes migrated, Atomic Data was free to turn-down the on-premises Exchange server.

THE NEW REALITY

All in all, the project was done without snags or significant roadblocks. "[Atomic Data] really kind of walked us through the phases… they were experienced from other migrations." Corey remarked. "They made it easy to simply execute the plan."

It's also easy to see why Our Family Wizard is pleased with their new, consolidated, and simplified reality. "We've consolidated everything down into a single pane of glass…previously I'd log into both Microsoft 365 and the on-prem Exchange Admin Console in order to manage our users. Now I can do that all-in- one spot." commented Corey.

"Atomic Data made it easy to get this done in a timely manner, as opposed to dragging it out for 3-4 years...it was the modern solution."

Ready to get started on your migration to M365?

Contact our experts to start planning your move

GET IN TOUCH

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– Corey Steiner, IT Manager for Our Family Wizard

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