



Spoiler: A Successful Network Migration

Background

Our long-term client, a deep-value investment firm, was experiencing severe latency issues and outdated versions of Microsoft programs on their original platform. The environment hindered productivity with slow opening times for large Excel files, multiple open files often suffered performance issues, and the inability to allow two users to work on a file simultaneously. The platform also posed challenges in integrating with their new CRM, Salentica Engage, implemented in March 2023.

The Migration Process

The migration to SharePoint was smooth, requiring minimal preparation effort from the client. They spent a small amount of time restructuring and reorganizing some of their files and folders prior to the migration. Anderson Technologies' discovery project with their prior service provider allowed for a clear understanding of the project complexity and expected timeframe. Regular updates kept the client informed, and the project stayed on track, concluding as expected.

The Impact

The SharePoint/OneDrive migration had a significant impact on the client's team, particularly in terms of speed and collaboration. The elimination of file performance or File Explorer/Outlook latency issues allowed the team to work quickly, especially during their busiest time, the quarter-end. The ability to simultaneously work on files

improved collaboration, making processes smoother and quicker.

While SharePoint and their CRM are yet to be integrated, the client expects this to greatly enhance their ability to find all information about a client as quickly as possible. This will allow their Head of Client Relations to pull up a client's record in the CRM and view not only account details, but also any documents related to that client housed in SharePoint.

The Results

Anderson Technologies' successful SharePoint migration eliminated latency issues, outdated systems, and file lag for our client. The process was smooth, and the impact was significant, improving speed, collaboration, and efficiency for the client's team.

*Client names are not provided in accordance with our commitment to privacy and security.

Ready for a Change?

Does our client's "before" scenario sound all too familiar? Before you decide to disconnect from your old network, let us help. At Anderson Technologies, we believe in making informed decisions. Allow us to take an in-depth look at your current environment and provide expert consultation on your potential project. Together, we can turn your "before" into a successful "after," just like we did for our deep-value investment firm client.

