A Panel Discussion

Panelists
Darren Palmer, Vice President & Chief Information Officer
Mutual Insurance Company of Arizona

Leslie Mallonee, Senior Vice President, CIO
Physicians Insurance A Mutual Company

Alan Cox, Senior Engineer
ISG Technology

Questions for the Panel
1. Why did you move to a hosted solution?
2. What implementation challenges did you encounter?
3. What was the reaction of the user community?
4. What was senior management’s reaction?
5. What issues have you faced post-golive?
Why we moved to a hosted solution

- Email archiving solution
- Additionally:
  - License/Version Consistency
  - UG Cycle
  - Features (E3)
  - Redundancy/DR/BC
  - Costs (Licensing/Infrastructure)
  - Consolidation of services
  - Support

As part of ongoing efforts to refine and improve our Business Continuity Plan, we focused on email
- Importance of email as communication tool, in event of a disaster
- Have had our own issues with our Seattle office building and frequent planned power shutdowns

So starting in summer 2013, we explored options to move to hosted email
Why move to hosted email?

- Key criteria
  - Security (HIPAA compliant)
  - Reliability
  - Ease of integration
  - Cost
- After looking into different options, we chose Microsoft Office365
  - Data centers in US
  - Had no issues with HIPAA compliance and BAA
- Currently on the E2 plan (email only)
- Plan to move to full Office365 (E3) late 2015/early 2016

Why move to the cloud?

- Biggest Drives
  - Mobile users
  - Integration
  - Compliance
  - Cost/ROI
  - Backup
  - Storage
  - Reduced load on IT Staff
Challenges encountered

- Considerations
  - Decisions
    - Hybrid vs cut-over/staged migration
    - SSO ADFS vs DirSync
  - Outlook Profile change over
  - Training
    - PowerShell
- Project Length
  - Planning
  - Configuration changes
  - Data/Account clean-up
  - Migration of data

What challenges did we have?

- We used a local systems integrator, recommended by Microsoft, but ….
  - Not pleased with their knowledge and experience
    - Had dealt mostly with small companies (< 25 employees)
    - And mostly with start from scratch, not migration of existing on premise Exchange
  - They became a middleman in dealing with the software provider (Skykick) we used to migrate
- Network bandwidth
  - Was an initial concern and a limiting factor that made us copy mailboxes in small groups of users
  - After go-live: has not been an issue
What challenges did we have?

- Go live issues
  - Integration with spam filter software and changed IP addresses
  - Calendar issues:
    - Calendar permissions needed to be re-set
    - Calendar items originally created before cutover
  - Local cache issues
  - Internal system generated emails (document management system, internal apps) needed to be changed

- Migration
  - Started in Oct 2013 with handful of IT staff
  - Final cutover Feb 2014

What Challenges come with moving to Office 365?

- Planning and what plan?
- Method to use
- Use a good vendor
- Namespace/DNS
- Best to use Hybrid if coming from 2010/2013
- Dirsync vs ADFS (both?)
- PUBLIC FOLDERS!
- EOP or?
User reaction

- Office upgrade ("change")
- Minor Outlook changes
- OOO
- Additional features/licenses YTB announced

What has been user reaction?

- Change was fairly benign – email only and with same version of Outlook
- Education about changes to email:
  - Example: signature setup needed to be re-done
  - Mobile / remote access changed (e.g., OWA)
- One issue has been educating staff about password changes
  - We chose not to integrate with our Windows AD
  - So password changes could be on different schedule from Windows password changes
- Overall, after these issues in first week of cutover, the move has been a non-event
User Experience

- New URLs
- Password Prompts
- Profile Recreation
- Password Sync (SSO?)
- New ways of doing things

Senior Management reaction

- Improvements
  - Access/Mobility
- Concerns: weighing mobility/accessibility vs access control
- Security Concerns
  - Hosted vs On-premise
What has been senior management reaction?

- Initial concerns:
  - Losing control of data
  - Responsiveness of vendor (as opposed to in-house)
- Since the cutover, the reaction has been neutral
  - Higher comfort about Microsoft having our data on their servers and with their support
  - Glad to have email access during our Seattle office power shutdowns

Senior Management Reactions

- Security
- Collaboration
- Uptime
- SLA
- Retention
- Exactly where is the “cloud”?
On-Going Support Issues

- Ongoing
  - User specific sharing.
    - Calendars that had been shared by users have to be re-shared.
    - Mailbox permissions need to be audited and re-applied.
  - Office standardization
  - Click-to-Run
  - Skype
  - Archiving...

What post go-live issues have you had?

- Small number of minor issues with Office365, but no major outages
- Shift in mindset – can no longer direct IT resource to fix a problem, have to rely on Microsoft
- Employee understanding is evolving
  - Password setup/changes
  - Network access dependent on Internet access
    - Example: had multi-hour network outage (local network provider problem) caused confusion – staff on site could access internal systems, but not email; staff off-site had the opposite
Post live considerations

- IT staff still has **SOME** control
- Portal
- Powershell
- Enhancements/improvements
- Mostly looks/feels the same as on-premise

We Welcome Your Questions...

*Please use the microphone so others may hear you.*
MOVING TO THE MICROSOFT CLOUD

Thanks to our Panelists!