



Journey to the Microsoft Cloud: Global financial services institution modernizes and protects data assets with Microsoft 365

Faced with the technical, compliance and data security challenges of launching Microsoft 365 across their global enterprise, a large financial services and investment institution needed to successfully deploy Microsoft 365 to its 30,000 employees while ensuring governance, compliance and data security. Because of the size and complexity of their firm, the financial institution had concerns with meeting strict, complex regulations in over 30 different countries before moving their data to the cloud.

Also, after experiencing issues with its legacy business collaboration applications, the institution recognized the need to modernize its endpoint management and collaboration applications to support an ever-increasing mobile workforce.

The firm partnered with Protiviti to deploy Microsoft 365 securely and provide employees with a seamless hybrid approach to operations between on-premises and the Microsoft cloud. The Microsoft cloud solution also would offer cloud-based productivity tools that allowed flexibility for the firm to build and grow on its own terms. With the proper controls and policies in place, the firm would be able to make its journey to the Microsoft Cloud securely.

A roadmap for success

To begin, Protiviti conducted an in-depth Microsoft 365 cloud assessment that identified three key areas for impact and improvement:

- Identifying the technical and application gaps for cloud migration and/or transformation
- Addressing the impact of cloud transformation on the end user. (i.e., When we move this person's data, how will it affect them and how do we best inform them?)
- Understanding and minimizing risks. (i.e., When we move sensitive and confidential data to a cloud system that we don't own, how do we ensure that data is secure and remain compliant with global regulations?)

After completing a successful pilot deployment of Microsoft 365 to 100 employees, Protiviti worked with the client to build an incremental deployment plan for the enterprise. A multi-year Microsoft 365 Strategic Roadmap was created to ensure best practices were followed and a sustainable adoption plan was in place as new solutions were rolled out to employees.

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The move to the cloud is not performed in a single step. The roadmap identified short and long-term deployment priorities for Microsoft 365 and its supporting technologies: Exchange, Microsoft Teams, OneDrive for Business, SharePoint, Yammer and Intune App Protection. These features and capabilities were dependent on integrating with other systems that needed to be deployed as well, especially since the large, global institution had data centers around the world with different requirements to be addressed.

Users were moved to the cloud incrementally, enabling specific groups and regions until users throughout the entire global institution were on board.

The next phase was focused on the migration of the firm's data to the cloud. Rather than perform a straight lift and shift, Protiviti conducted a deep assessment of the data and developed a detailed wave approach to transfer terabytes of data in stages. This process was automated and governance controls were instituted for a more compliant architecture post-migration.

Endpoint management and data protection in Microsoft 365

Financial institutions are highly regulated. The firm faced strict, specific requirements around cybersecurity, data hosting and regional constraints, creating an additional level of complexity. It worked with Protiviti to protect its data assets and implement modern endpoint security and device management.

By implementing the technology infrastructure for endpoint management and long-term applications, the firm was able to significantly improve operational efficiency, support user mobility and enhance collaboration across its global regions and business units. Additionally, a roadmap was created to move to a fully automated Microsoft Endpoint Manager deployment of mobile phones, laptops and tablets — a large undertaking for any firm, but especially for a financial institution with a global user base. This allowed the firm to secure, deploy and manage all users, applications and devices without disruption to existing processes.

Through the migration process, inaccurate classifications on large amounts of data surfaced with unmet security and compliance requirements. Protiviti implemented [Microsoft Information Protection \(MIP\)](#) to secure its digital information without compromising the ability to use its data for business purposes. Protiviti worked with existing staff and capabilities within the environment, and qualified and trained users to run and support the program. The MIP solution enabled the firm to update data protection and the end-user experience with a single platform for all data security components to improve accuracy and maintainability.

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Becoming cloud “focused” with Microsoft 365

The firm’s IT leaders and end-user-experience team were focused on committing to using cloud technology. They structured the firm to be product-centric, with a combined team of dedicated individuals to manage the end-user experience through product deployments and with the infrastructure and IT teams responsible for the deployments. This allowed the firm to understand the needs of the business more clearly across a very large group of department stakeholders and to pair it, from a planning, investment and timing roadmap, with an infrastructure team responsible for maintaining ongoing systems, legacy systems and the move to the cloud.

With the right framework and controls in place, the financial services institution was able to successfully transform and migrate its data to the cloud and ensure that its users were ready to support and continue to securely manage its data. This methodology is even more important in the world of evergreen cloud technologies to ensure that as Microsoft solutions are rolled out, users and operational staff are aware and ready. Implementing Microsoft 365 and other Microsoft technologies provided modernized platforms and improved collaboration across the global enterprise. Most importantly, their new cloud solution now meets global requirements and regulations for the financial industry while addressing data privacy and protection.

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