



Compete 366

Microsoft
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Gold Small and Midmarket Cloud Solutions
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Case Study

Transforming IT capability with Office365

Patient safety and risk management software vendor, Datix, worked with Microsoft Gold Partner, Compete366, to transform its IT capability.

This case study explains how Datix simplified its IT service delivery, extracted better value from its IT budget and overcame technical limitations of its technical infrastructure.

Datix is a leading provider of software for patient safety and risk management for the healthcare sector. As a business with several locations worldwide and over 150 employees, Datix has grown exponentially since its inception in 1986. With a truly global reach, and new acquisitions being added to the company, having an IT infrastructure spread over several external suppliers for email and file and data sharing was unmanageable.

Datix needed a robust IT solution that would be flexible enough to allow the company to grow and enhance its productivity across all the sites worldwide and bring all the employees into one central IT location for email and data and file sharing.

Comprehensive research pointed to Microsoft Office 365

Datix undertook substantial initial research and determined that Office 365 would not only be the best IT platform for them from a functionality point of view, but it would also offer a cost saving over their current G-suite subscription with the bonus of bringing in many other tools in the same fold.

Examples of new tools which they would benefit from included document management tools such as SharePoint and OneDrive, and chat/instant messaging by moving to Skype for Business and MS Teams from Slack and Google Chat. By amalgamating these tools into one provider, the saving in operating costs was considerable.

Microsoft Gold Partner appointed to lead deployment

With connectivity being key and having a fully functioning IT infrastructure across the sites in which they operate in the UK, USA and Australia, Datix looked for an external consultancy which understood its needs and challenges.

Finding a company that fully appreciated its business requirements and which could manage the migration process to Office 365 from start to finish was crucial to Datix.

Compete366, an Office 365 Gold Partner, fitted the bill and ended up leading deployment of four separate projects designed to transform Datix's IT systems, including migrating all users at Datix to Office 365 from Google Apps.

Why Datix chose Office 365

Compete366 engaged with Datix to understand the company's current infrastructure and application environment across the organisation and worked closely with them to develop a solid migration plan from Google Apps to Office 365.

Paul Tarling, VP Customer Success, UK & North America at Datix, said; "We came across Compete366 through Microsoft's website and decided to start our journey with them for our Office 365 migration project as they seemed to have a clear understanding of our business and requirements from the get-go."

Datix had three main motivations for migrating to Office 365 – to simplify the management of its services, extract better value from its IT budget, and to overcome the technical limitations of its existing infrastructure which was impacting the delivery of its service.

The company elected to move from a mixed vendor solution for their IT requirements to having all their IT infrastructure with one vendor and in one place. This move was driven around technical difficulties they experienced with Google's G-suite, which contained complex rules on how they could interact with some of their key customers. These issues included not being able to assign different primary email addresses within Google (which impacted their ability to serve a US government contract) and permissions becoming hard to manage across different platforms. There was also a clear efficiency gain by engaging with and using just one IT solution.

Paul Tarling continued: "We engaged with several other vendors to see if they were the right fit for us, but ultimately settled on Office 365 and Compete366 to deliver the migration for us. We looked at other cloud-based solutions, revisited the Google Apps suite to ensure we were making full use of its functionality and we even considered installing Exchange and going for a locally hosted solution. This turned out to be very expensive. Over time it became clear that the best solution for Datix was to migrate fully to Office 365."

Office 365 offered the most sensible solution for Datix as many of their staff members already used the Outlook interface in their personal lives. This was a key consideration when choosing a single vendor to migrate to, as the need for staff training would be substantially reduced.

Paul added: "Compete366 gained our confidence in some of our early pre-sales calls. We chose them over a larger corporate partner because larger firms tend to be quite rigid about projects going from point A to point B without considering or knowing what the problems are that small businesses and SMEs face. Sometimes, larger consultancies seem to focus more on getting the job done then taking the time to understand their customers. Compete366 pointed out challenges we didn't know we had. They understood our space."

Step 1: Migrate Datix Email from Google Apps to Office 365

This was a complex email migration project as it involved the migration of users in the UK, USA and Canada. These users were also on four different email domains hosted on two different Google Apps tenants.

Compete366 worked very closely with Datix throughout the project, which kicked off with educating the Datix team on the detail of all Office 365 services, including how they operate and how they are licensed. As a starting point, Datix wanted to use email and Skype for Business.

A detailed email migration plan was developed which included a fully risk mitigated low user disruption approach. Compete366 used the SkyKick migration tool to deliver this.

The project was kept low-risk because email data was copied rather than moved with a simple roll-back plan if required. There was no email loss and no email downtime for users during the migration process.

Mailboxes and domains were migrated into Office 365 in one project with an agreed cut-over date and time at which Office 365 would become the live mail service for all users. The Datix teams were able to sign in to their Office 365 accounts in the days and weeks before cut-over to confirm that their mail, calendar and contact data that had been copied up to that point was there. A final sync of the mail data from the source systems to Office 365 was then done at cut-over, and then hourly sweeps were performed for 72 hours after cut-over.

Compete366 had already detailed what was going to happen, when, and a small number of things that would need to be done post-migration when switchover day arrived. The migration went smoothly. There were no major issues and Compete366 provided post-migration support to Datix before handing over the Office 365 environment to Datix's own IT team.

Paul commented: "This project was one of the smoothest we have run. There were no problems at all with email availability, then switchover was seamless. On the day of go-live and even the week after, we heard virtually nothing from our end users, which was a very good sign. Their Office 365 accounts and email were working exactly as they should. When it comes to email migration we know that no news is often good news."

Step 2: Migrate File Data from Box.com to SharePoint and OneDrive for Business

Datix utilized Box.com for its online file storage, both for shared and personal data. However, the company also used Box to share documents externally with customers. By this time, Box had stopped supporting legacy versions of Internet Explorer and some customers were still using it. It was impossible to share documents with these customers.

As Office 365 already includes SharePoint and OneDrive for Business, it made sense for Datix to migrate its file data from Box.com to grant shared file access to customers, reduce expenditure and simplify its file management.

Compete366 worked with Datix to deliver a clear plan to migrate all file data into SharePoint and user data into its OneDrive for Business accounts. Compete366 provided a full end-to-end service on the project which included design of the Document Management System in SharePoint, migration of the file data, administration training and go-live support.

Datix was able to continue using its files on Box.com during the migration process. After switch-over users were able to access files from the newly created SharePoint Document Management System and access personal data via OneDrive for Business. Again, this project was a low-risk migration as all Datix's data files were copied rather than moved.

Step 3: Migrate Email Data for Riskman from Datix's On-Premise Exchange to Office 365

At the end of 2017 Datix acquired a business in Australia called Riskman and began the process of integrating it into Datix.

Compete366 migrated the domains, mailboxes and users from Riskman's on-premise Exchange server into the Datix Office 365 tenant. All the same processes and steps from the first email migration project were applied, but their source system was different. Riskman users accessed their email via the Outlook mail client, whereas Datix users accessed their email using the Outlook webmail client. Therefore, Compete366 also automated the connection of Outlook clients on their PCs to their new Office 365 mail accounts at switch-over time.

Project 4 – New Active Directory Domain and Migration Tool

Datix had two Active Directory Domains, one for UK staff and one for USA staff. Active Directory Domains enable centralised management of users, groups and devices improving, streamlining and simplifying administrative IT tasks such as adding and managing new users. As Datix planned continued growth, organically and by acquisitions, being able to integrate new businesses would be important for the future.

Compete366 advised on an appropriate Active Directory Domain structure to meet future needs. The firm then implemented the new structure adding a Domain Migration tool to allow Datix to perform migration of new users and computers. Now, when Datix makes additional acquisitions, it will be able to follow established procedures using proven tools.

Simplify, deliver better value, modernise

Email is mission-critical to most businesses. Migrating email can be a very high-risk undertaking because a company's reputation can be severely damaged if it goes wrong. Choosing a partner with a lot of experience and expertise in migrating email to Office 365 was important to Datix.

Along with adding in additional tools, Datix has also made significant time savings by utilising tools such as Outlook and Salesforce integration, which they found did not work in tandem with G-suite. Using this plugin alone has saved the

sales team over an hour a day per person in sales admin time. By bringing all of its IT tools together in one place, Datix has saved approximately five hours of administrative effort per person per month.

G-suite did not provide tools for forcing regular password resets on user accounts, which didn't meet Datix's security standards. Datix's ISO auditors had also highlighted this is a matter for consideration. Office 365 provides this functionality out-of-the-box, so solved the issue flawlessly. User adoption has also been higher due to making use of a consistent user interface across their core business toolset.

Datix is now looking at adding more tools such as Microsoft Planner to replace Trello, and Power BI which offers a reporting capability that was previously simply unavailable. In addition, Microsoft Flow and PowerApps have the potential to solve some other business challenges that Datix is faces. They are included in their current subscription package, removing the need for the company to have to look at alternative tools at additional cost.

As Datix expands, Office 365 gives it a globally scalable platform with powerful collaboration features and its new Active Directory Domain structure allows simple administration with new acquisitions. Working with Compete366, Datix has been able to re-architect and deploy key parts of its IT infrastructure to support global growth.

Delivering real business benefits

Speed: Moving to one vendor for their IT requirements has simplified administration meaning that Datix move faster.

Control: permissions are much easier to manage giving Datix's IT team more control over users, groups and devices

Value: Office 365's bundled products and services have replaced numerous third-party applications delivering improved, connected services at better value.

Effectiveness: the Salesforce plugin has been invaluable. Combined with other integrated tools like Webex and Hi-5 for video conferencing, Skype for Business and Teams, Datix's sales teams have enhanced collaboration and effectiveness.

Datix remains engaged with Compete366 through regular monthly calls. Compete366 keeps on top Office 365 developments for Datix and makes appropriate recommendations as improvement opportunities arise. Datix have come to rely on Compete366 as is source of expertise on Office 365.



About Datix

Datix is a global pioneer in the field of patient safety. Over the past 3 decades it has become a leading provider of software for patient safety and risk management for the healthcare sector. Datix has offices in the UK, USA and Australia and customers in the USA, Canada, Europe, Australia and the Middle East.

Datix has made considerable advancements in its software with cloud-based technologies and solutions. The software is compliant with all legislative boundaries within the UK together with compliance with the security, confidentiality, integrity and availability requirements of the NHS Governance (NHS IG) toolkit.

To find out more about migrating data or services to Office365, please call Warren Duke on 07500 919547 or email engage@compete366.com quoting "DCS".