Case study

Forum for the Future

advania

FORUM FOR THE FUTURE

Services:	Industry:	Organisation size:	Completion date:
⬡ Professional Services	⬡ Not-for-profit	⬡ 100 people	⬡ April 2024

Overview

With personnel located around the world, Forum for the Future (Forum) had a pressing need to adopt a streamlined data management system and an enhanced technology infrastructure.

Ambitious and complex, this data-focused migration would impact every aspect of Forum's work, enabling staff to work effectively and consistently in a more secure environment.

Key Facts

- **£16,000** minimum annual cost saving

- **540,000** files migrated to SharePoint

- **Two months** to complete migration

Enhancing global data performance

Forum for the Future, a leading international sustainability organisation with offices in the UK, US, India and Singapore, works in partnership with business, governments and civil society to accelerate the shift towards a just and regenerative future.

With more than 80 staff worldwide, Forum for the Future (Forum) approached Advania with a pressing need to streamline its data management and enhance its technological infrastructure. Forum needed to augment the capability of its existing IT managed services provider and **its** in-house IT team with the expertise of Advania's digital transformation specialists.

Recognising the importance of the work that Forum does, Advania was delighted to partner with a client that not only closely aligns with Advania's own ESG ambitions but is leading the field in achieving the sustainability goals that will shape the future of business.

Challenge

The primary focus for Forum was on migrating its data from Dropbox to SharePoint Online. Both ambitious and technically challenging, this transformative operation would have a big impact on the ability of Forum's disparate staff to collaborate effectively and consistently, and in a far more secure environment.

Having already successfully migrated much of its IT infrastructure onto the Microsoft 365 platform, Forum was left with a set of data and documents in its legacy Dropbox tenant. Once a key part of its collaboration systems architecture, together with Google Workspace, changes in technology and user needs meant that this platform no longer met user requirements and represented a costly additional expense.

The SharePoint migration required expert assistance from Advania.

Forum required a defined target information architecture, together with creating data labels and mapping out their current content. Once its existing SharePoint settings had been reviewed, the user benefits of the new platform required scoping and outlining, before moving to planning the technical migration which would be carried out by the incumbent MSP.

Forum was particularly concerned about the ambition and timing of its plans and looked to Advania for expert validation and guidance throughout this migration project.

Solution

SharePoint is a versatile platform with many features and capabilities. The key to using it as an effective document and content management platform with an engaging user interface is good design and information architecture.

Leveraging our experience in user-centric information architecture design, our team created a target architecture for the document migration, which introduced a logical and user-friendly structure for Forum's data. Hosting the data in SharePoint also means that Forum can leverage modern technical capabilities such as Microsoft 365 Copilot.

Our Technical Migration team conducted a migration readiness assessment to evaluate the total size of the data, analyse any migration issues and highlight relevant permission considerations. This thorough assessment laid the groundwork for a smooth transition from Dropbox to SharePoint.

Our team worked in tandem with Forum's internal IT management and its incumbent managed services provider to structure the migration and oversee its successful delivery.

Throughout the engagement, we maintained open lines of communication with key stakeholders of Forum's migration team, including the COO and Operations and IT Systems manager, who were pivotal in coordinating the project.

Outcomes

With the successful migration from Dropbox to SharePoint Online completed, Forum now benefits from significantly enhanced data management capabilities. The new system offers improved accessibility, better security and streamlined collaboration among team members.

Additionally, the tight timeframe needed by the client was met, meaning that Forum was able to cancel its Dropbox contract in time, securing an early tangible financial benefit of the business case for the migration, ahead of the multitude of others that followed.

Products and Services

- SharePoint Migration Assessment
- Migration planning
- SharePoint Information Architecture Design

"We really valued the expertise that Advania brought to this project. SharePoint can be a difficult platform on which to create an optimal user experience, but the architecture capability that Zoe (Advania Solutions Consultant) brought to the project meant that the quality of the solution was never in doubt."

Claire McPherson | Operations and IT Systems Manager

"Working with Advania has been a transformative experience. Their expertise and commitment have been invaluable and our partnership with them demonstrated their dedication to sustainability, but also ensured that we could achieve our goals efficiently and effectively. We are grateful for their support and look forward to continuing our partnership."

Chris Baker | Chief Operating Officer