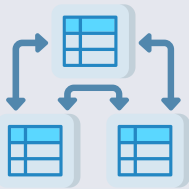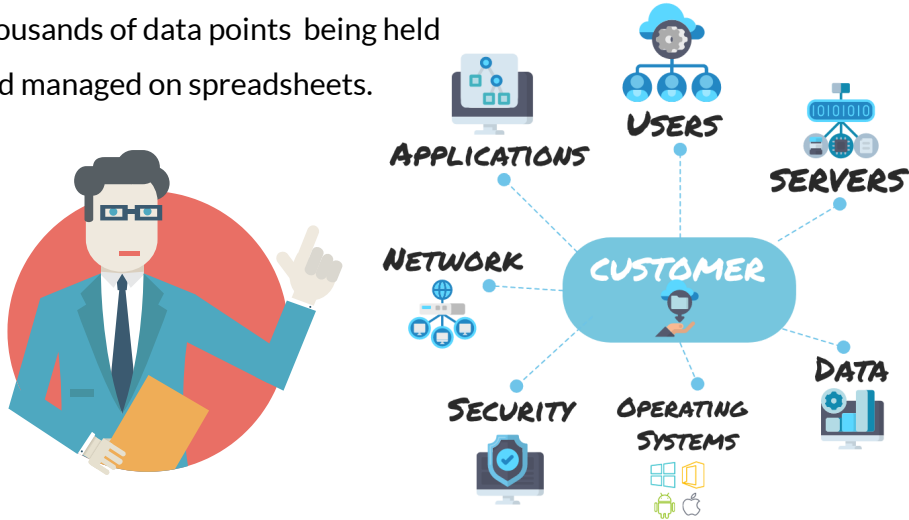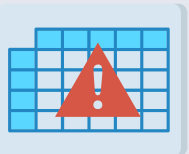## SITUATION

UK Public Cloud Provider acquired a SaaS business and needed to migrate over 500 B2B, customers with 20,000+ users, within 9 months. Customer data is stored over 7 primary sources totalling tens of thousands of data points being held and managed on spreadsheets.

USERS · APPLICATIONS · SERVERS · NETWORK · CUSTOMER · DATA · SECURITY · OPERATING SYSTEMS
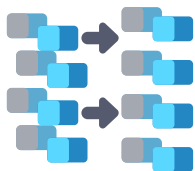
The data needed to migrate customers into the Cloud is shared on 100s of spreadsheets and stored in multiple areas of the business by numerous different stakeholders.

The Project Manager is having difficulty locating the relevant information and many spreadsheets are returning error codes and duplicate data.
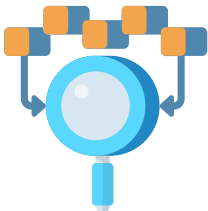
CHALLENGES

TOO MANY SPREADSHEETS, NOT ENOUGH TIME!

Spreadhseets with relevant data are scattered around everywhere and it's hard to make sense of it all. Trawling through a multitude of documents can take up a lot of precious project time.

ERRONEOUS DATA

Too many spreadsheets have broken macro or other defects making some data unusable or needing manual, painstaking intervention to cleanse it. Often data is incorrect or duplicated making reporting inaccurate.
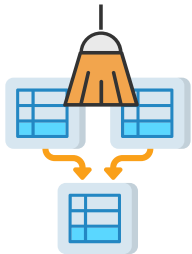
FINDING AN OWNER

It is difficult to trace owners of documents to verify accurate information or find a home for relevant data. Version control is poor and documents are mostly shared via email and stored locally.
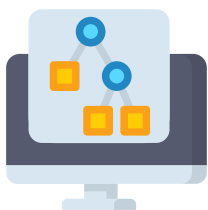
SOLUTIONS

CENTRALISED DATABASE

Data will be stored in one central place and can be shared with relevant colleagues to view and update content. Tracking can be setup to notify those of any queries or updates.

CLEANSED DATA

Spreadsheets are consolidated and cleaned when importing them into portfoliON, reducing risk of error and duplicate data to improve upon reporting and dashboards.

STREAMLINED WORKFLOW

Cut out the middle-man by introducing an automated streamlined process to manage documentation. This includes automated document tracking, work scheduling and reporting.

ACTIONS

- The project was able to build tailored application using portfoliON to manage documents effectively and extract useful data.

- When content was updated, notifications were sent to team members so they can progress with project actions, using an automated streamlined process.

- Data contained in portfoliON was more accurate meaning migration activity was easier to plan and schedule and keep to project timelines and deliverables.

- Project Manager was able to spend less time sharing documentation with the project as team members had ownership of progressing their own work.

RESULTS

REDUCTION IN DEFECTS

60%

INCREASED MIGRATION RATE

4X

ADMIN TIME SAVED

3 HOURS
PER DAY

PROJECT TIMELINE REDUCED

2 MONTHS