Case study

Jan 2025

Finding a Waythrough the merger

Waythrough is a charity specialising in mental health, alcohol, drugs and related areas, formed from a merger of two like-minded organisations. They engaged Waterstons to plan and carry out the technical merging and rebranding of their IT systems.



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Results at-a-glance

Microsoft 365 tenant-to-tenant migration, including

- 1,590 users, each with a mailbox and OneDrive
- 439 shared/resource mailboxes
- 319 SPO sites and Teams, totalling around 3.5TB
- 1,112 Windows computers migrated rapidly and automatically between environments
- A data lakehouse fronted by Power BI
- 11 other integrated applications of varying complexities

Subsequent rebranding of environment including 3,758 mailboxes and 499 groups to a new identity, for the deadline of October 1, 2024. The entire project was delivered in five months from design to migration and rebrand.

The objective

In December 2023, Humankind and Richmond Fellowship announced the decision to merge to form a new national charity to better support people facing multiple disadvantages. By taking what is best from each other, the new organisation could meet more people where they are and break down the barriers that stop people getting the support they need to live a life they value.

Following the legal merger in June 2024, with Aquarius as a subsidiary, the business requirements were three-fold:

- Rebrand the merged organisation to a new identity by October 1, 2024.
- This was a merging of partners, not a takeover of one organisation by the other
- Maximise the ability for people across the organisation to collaborate
- Maximise savings and increase efficiency through economies of scale and consolidation of duplicate systems.

Approach

Waterstons was engaged to plan, lead and help implement the technical side of the merger and rebrand, alongside the IT teams from the component organisations.

A low-level design and planning phase was undertaken, using lessons from TOGAF to define a multi-workstream implementation plan. The effort spent here paid dividends for the remainder of the project, ensuring that the dependencies were well understood and the execution carried out smoothly.

The core of this effort was the consolidation of two Microsoft 365 tenants into one through migration of users and services from the Richmond Fellowship into the Humankind tenant. This was conducted by pre-staging and preparing data and services as far as possible and performing a 'cutover' migration during a maintenance weekend. Application preparations varied depending on the app being used, from proving cutover and rebrand processes to building new app instances to transition to a point of migration.

We decided early on to separate out the Microsoft 365 migration from the rebranding. This allowed us to reduce technical complexity and the amount of change experienced by end-users at one time as far as possible, ensuring support was much more manageable. Once all users and devices were in a unified environment, the process of rebranding to a new identity would become much more straightforward.

Challenges

While the Waterstons team has extensive experience of successful Microsoft 365 migrations of a variety of sizes and complexities, this project had some unique challenges:

- Due to the size of organisation and nature of the industry and volunteer work in particular, there was a relatively high turnover of user accounts. This presented a greater than usual challenge in maintaining appropriate target accounts during the migration preparation phase.
- With a distributed workforce of over 1,500 users, typical approaches successful for smaller or localised organisations would not scale, such as re-imaging devices and providing in-person support.
- There were a number of key business applications integrated with the Microsoft 365 environment, including but not limited to the primary case management system, data lake-house fronted by Power BI, the HR system, various internal service desks and email encryption software.

Key successes

One of the foundations of the success of this project was a truly collaborative project team formed across Waterstons and the Richmond Fellowship and Humankind IT departments. This teamwork fostered open communication, responsiveness, mutual respect, and a shared commitment to the project's goals.

Close collaboration and planning with a number of vendors and system owners also ensured a detailed inter-dependent implementation plan, and ultimately a smooth transition of services integrated with Microsoft 365.

On top of our regular toolkit, we utilised the PowerSyncPro DirSync tool to synchronise **1,590 user accounts** from the source to the target environment, performing appropriate transformation on account attributes where required as well as bi-directional password synchronisation. Coupled with a bespoke validation process, this significantly reduced the burden on the project and support teams for managing changes to accounts during the preparation phase. It also eliminated the need to communicate new passwords to users and facilitated backwards-compatibility to easily authenticate for any services remaining in the source environment.

The PowerSyncPro Migration Agent was also used to automatically transition **1,112 Windows computers** from the source environment to the target environment. This was faster, cheaper and logistically easier than a small army of engineers rapidly re-imaging devices across the country, and ensured a good user experience immediately following migration - the vast majority of users were back to work within an hour of coming online.

In the client's words

"Whilst the scale of this project was significant, it was incredibly reassuring to see how our excellent internal team and Waterstons worked together. From the onset, it was clear we'd engaged a customer and solutions-focused partner, who matched our commitment in delivery excellence."

Dave Marsh – Executive Director for IT & Digital

"We've had lots of positive feedback from across the business. In particular, our programme manager who sees M&A activities day in day out said "this was the smoothest merger I've seen.

"We would have been facing a very challenging migration rebuilding devices using autopilot if we hadn't had the PowerSyncPro tool. People were quickly back to working following this major cutover. The solution was a gem - a real win for the project.

"The Waterstons project team were really responsive to queries. We never needed to push for updates which bred confidence, and we always felt we were in good hands. Hats off, you've been a great team."

James Staff, Head of IT Operations

"Overall the project was a fantastic success."

Adrian Robinson, Assistant Director - IT Systems and Information

To find out how we can help you in migrating systems or updating software contact us today at info@waterstons.com and with Windows 10 coming to end of life in October 2025 what better time to start your migration to Windows 11? Contact ModernWork@waterstons.com to start your Windows 11 upgrade.