



A High AI-Q[™]
Company



SharePoint Online Upgrade for a Leading Insurance Company

Leveraging Office 365 to modernize agent collaboration, reduce infrastructure overhead, and ensure secure, high-fidelity data migration from legacy on-premises systems.

Overview

We executed a high-fidelity migration of over 20 site collections (45 GB) from SharePoint 2010 to Office 365 using ShareGate.

- Achieved a 15% reduction in server and infrastructure costs by transitioning to a virtualized cloud environment.
- Ensured total business continuity by retaining all metadata, timestamps, and version history, while implementing Single Sign-On (SSO) via ADFS.



Client Profile

This leading insurance group has provided specialized coverage and financial services for over 100 years. Operating through a decentralized model of local agent offices, the company manages vast volumes of critical insurance data and requires robust collaboration tools to connect agents with corporate headquarters.

Challenges: Infrastructure Costs and Data Fidelity

The client's legacy SharePoint environment was becoming a financial and operational burden:

- **Scaling Costs:** Increasing demand for Client Access Licenses (CAL) and additional physical servers was becoming unsustainable.
- **Native Migration Limits:** SharePoint's native functionality could not migrate business data with full fidelity, risking the loss of critical metadata and user history.
- **Mobile Workforce Support:** The existing on-premises setup lacked the flexibility needed for agents to collaborate securely from various locations without complex VPNs.

- **Governance Gaps:** Managing a growing volume of document-heavy insurance workflows across disparate departments required a more modern governance framework.

QBurst Solution: Hybrid Cloud Modernization

We implemented an incremental migration strategy to transition the client to SharePoint Online, focusing on data integrity and user experience. By utilizing ShareGate, we moved site collections, subsites, and complex taxonomy fields while ensuring no-code customizations remained functional.

The technical transition focused on high-availability and security.

- **Full-Fidelity Migration:** Successfully migrated 45 GB of data, preserving version histories and associated metadata for over 20 subsites.
- **Identity Management:** Configured ADFS to connect the on-premises Active Directory with Office 365, enabling Single Sign-On and the retention of original user timestamps in every list.
- **Seamless Branding:** Leveraged SharePoint Designer and jQuery to rebrand the new cloud homepage, ensuring a familiar interface for the agent workforce.
- **Secure Web Authoring:** Enabled browser-based publishing, allowing agents to manage and publish content from anywhere without requiring specialized software.

Key Features and Technical Highlights

- **No-Code Architecture:** Delivered a sustainable solution that minimizes custom code, simplifying future updates and maintenance.
- **External Collaboration:** Established secure channels for collaborating with external partners and agents outside the core network.
- **Custom Theme Integration:** Retained corporate branding across all templates and web parts to ensure user adoption.
- **Encrypted Transactions:** Replaced risky VPN dependencies with encrypted cloud transactions for secure "anywhere access."

- **Reusable Templates:** Created a library of web page templates to standardize content creation across different departments.

Impact

- **15% Cost Reduction:** Significantly lowered the expenditure on physical servers and associated infrastructure maintenance.
- **Eliminated DR Complexity:** The virtualized Office 365 environment removed the need for separate on-premises disaster recovery solutions.
- **Enhanced Productivity:** The "anywhere access" model empowered the mobile workforce, allowing agents to access critical documents and collaborate in real-time.
- **Zero Configuration Drift:** The use of ShareGate ensured that all Content Query web parts and taxonomy fields from the 2010 site were perfectly replicated in the cloud.
- **Future-Proof Scalability:** The new cloud foundation provides the flexibility to onboard new offices and agents instantly as the business continues to grow.