



Nortec Guides Schneider Downs Through Digital Transformation

Based in Pittsburgh, PA, with offices in Columbus, OH, and Washington, D.C., Schneider Downs is an accounting firm serving individuals and companies throughout the U.S. They currently employ approximately 700 employees.

As their critical IT systems approached Microsoft end of support, Schneider Downs decided it was time to modernize and move to the cloud. Not wanting to manage the migration on their own, they sought Nortec's expertise in guiding their journey. In a whiteboarding session, Nortec stepped Schneider Downs through the prerequisites for moving to the cloud and answered high-level questions. The plan didn't burden Schneider Downs' IT team with additional work – everything would be managed by Nortec.

HOW TO GET TO THE CLOUD SMOOTHLY

Schneider Downs wanted a comprehensive unified communications system they could use to hold virtual meetings with external clients. This was not possible with the legacy software, like Microsoft Exchange, employees relied on every day. The firm knew it needed to move to the cloud to gain functionality for its team. Then, once the migration began, Schneider Downs decided they needed a more resilient mobile device management (MDM) solution. The MDM solution employed at the time didn't completely cover the organization, with gaps dating back to its implementation.

A WHITE-GLOVE APPROACH TO MIGRATION

To securely communicate with clients and collaborate with colleagues spread out across the country, Nortec migrated Schneider Downs to Microsoft 365. The suite offers email and other critical apps, like Teams. Schneider Downs wanted their employees to fully understand

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the platform and had Nortec help the leadership team craft a communication plan for adoption and change management. This was used during mini townhalls Schneider Downs conducted to explain what OneDrive is, how to use SharePoint online and answer other questions people had about the move to the cloud.

Nortec deployed Microsoft Enterprise Mobility + Security (EM+S) to close gaps created by the previous mobile device management tool. Additionally, a program introducing security at the time of migration was designed and implemented. When a mailbox shifted from on-premise to the cloud, the user's identity was enrolled in mobile device management and multi-factor authentication was turned on.

Nortec brought a white-glove approach to migration. Schneider Downs was kept fully informed, but their internal IT wasn't required to do any heavy lifting to deliver the solutions.

HOW SCHNEIDER DOWNS IMMEDIATELY BENEFITED FROM DIGITAL TRANSFORMATION

The project started in late 2019 and, by February 2020, Schneider Downs was fully migrated to the Microsoft 365 platform. The timing was fortuitous. A month later, the coronavirus pandemic forced businesses to work from home, and Schneider Downs had a reliable cloud-based infrastructure. Their older operational model, built around on-premise servers, would not have been able to support remote workers.

Demonstrating the benefits of digital transformation firsthand, Schneider Downs was able to rapidly pivot to remote work, bypassing the need to set up new systems. The audio, video and collaboration features in Microsoft Teams made it easier to work from home and improved internal and external communications.

The benefits will continue after the global pandemic ends. The modernization reduced management of physical machines, reducing their on-premise servers from 9 to 0, while enhancing their security. With the added mobile device management, the firm now has an iron-clad approach to protecting identities.

Throughout, Nortec minimized the impact on business operations during delivery by conducting tests and creating a detailed plan before the migration to Microsoft 365 started.



The world is changing. We can help you transform with it.
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