




# *One Team, One Dream, One Collaboration Environment*

Enabling IT to respond to M&A and other changes in ownership

# We Are AvePoint

Leader in Microsoft 365 data management solutions



 AvePoint<sup>®</sup> is headquartered in Jersey City, NJ, with approximately 1,500 employees across 29 offices, 14 countries, and five continents.



25%

Fortune 500



7M

Cloud Users



88

Countries



7

Continents

Microsoft  
Partner



5x

Partner of the Year  
Award Winner



# *Agenda*

Meet your hosts

State of play: M&A today

What business restructuring means for IT

Best practice approach  
(and how we can help at each stage!)



# Meet your host(esses)



**Kate Faaland**

SVP Client Services & Product Strategy

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CMO

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# M&A activity: trends this year

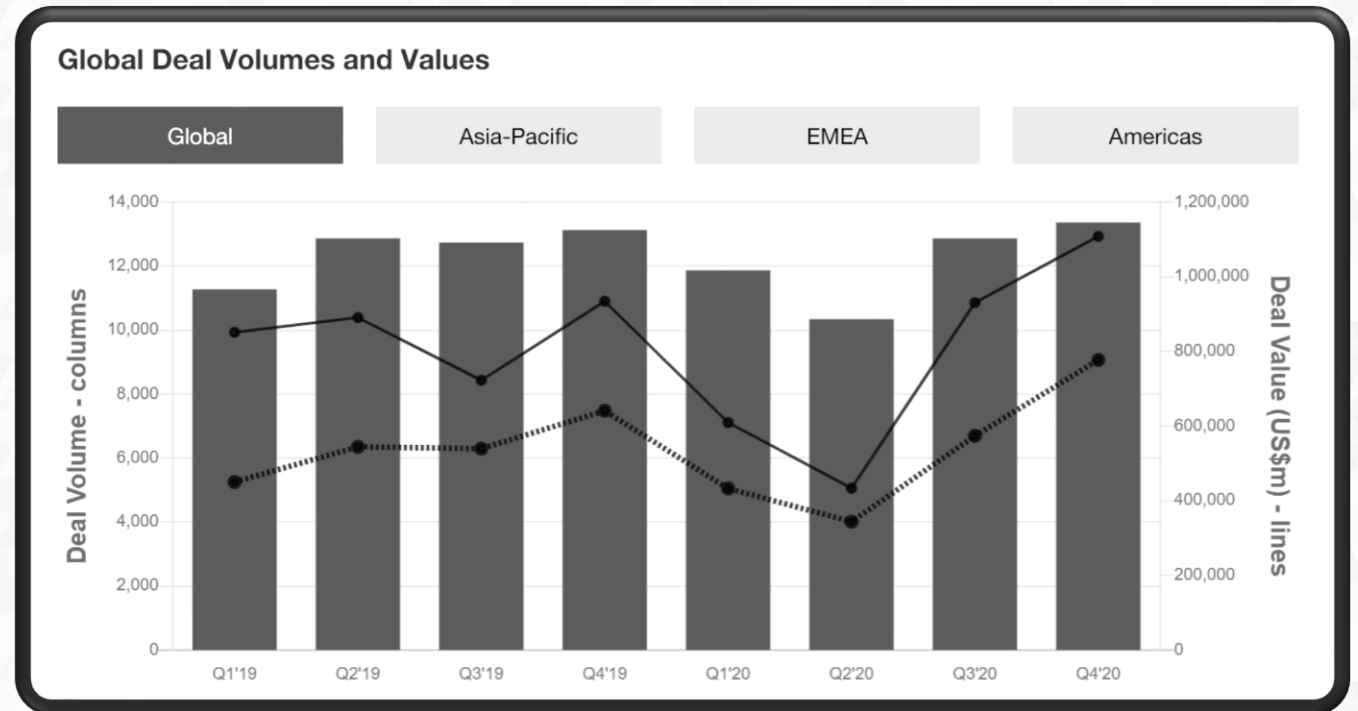
## What Business Leaders are Saying (PwC)

**76%** plan to allocate more resources to digital transformation... in:

- data analytics,
- automation,
- the cloud,
- customer experience, and
- product and service transformation.

**53%** would allocate more to M&A activity to achieve their key strategic priorities.

<https://www.pwc.com/gx/en/services/deals/trends.html>



# Getting to growth



CUT BOTTOM LINE (COSTS)



DRIVE GROWTH  
(NEW REVENUE)

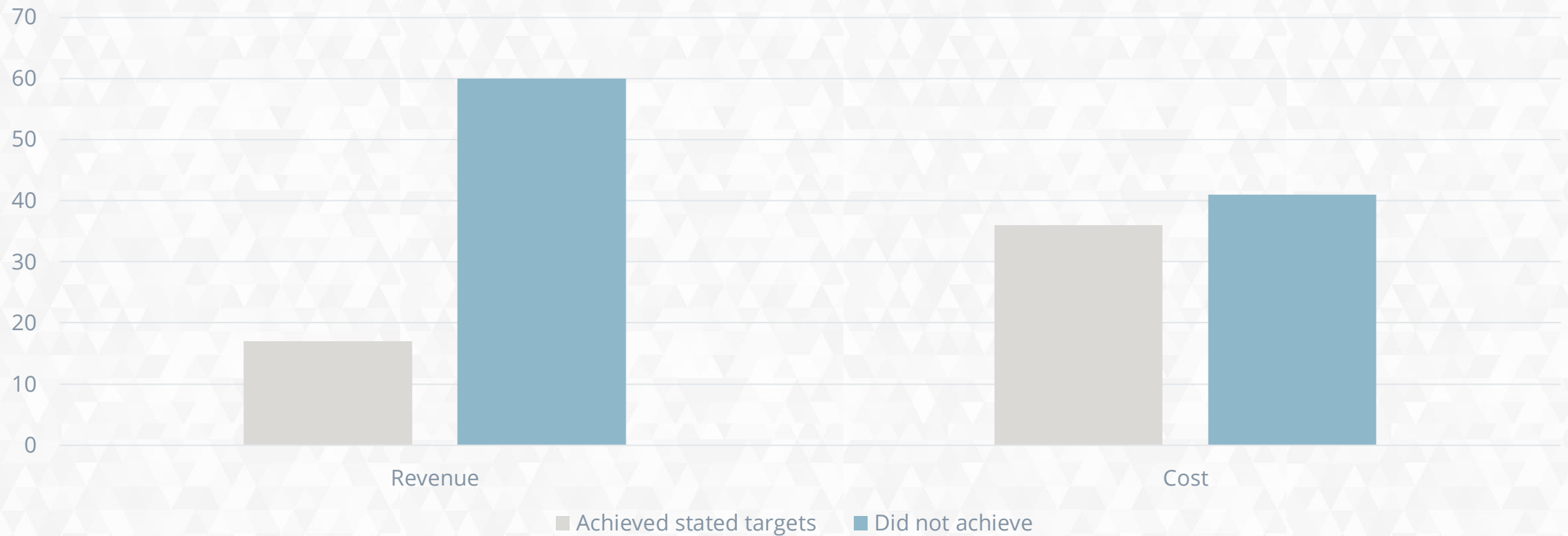


FORCE MULTIPLIERS  
(1+1=3)



# How likely are we to succeed?

Historical Data: What % of Mergers Achieve Stated Revenue and Cost Targets





Revenue synergy targets overestimated (negative synergies ignored)



Synergy team in headquarters silo



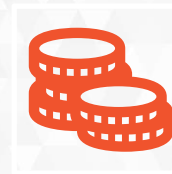
Start too late



Cost prioritized over growth



Sales attrition stifles growth



Pricing overlooked





# Aligning IT to support business growth



## Control costs

Consolidated systems  
& data

“Tenant consolidation  
& migration”



## Facilitate growth

Rapid digital (cloud)  
collaboration

“Microsoft Teams roll-out”



## Force multipliers

Scale through  
automation

“Automated self-service”

Business Goal

IT  
opportunity

Project



# M&A timeline



Secure exports  
Data protection

Initial systems scope

*Today's focus*



# Project considerations

## Organizational Maturity

- How mature are your organizational processes?
- How well do you understand your data and collaboration?
- Team experience in “migration”
- User reactions & change management

## Cost & complexity

Speed to  
consolidate

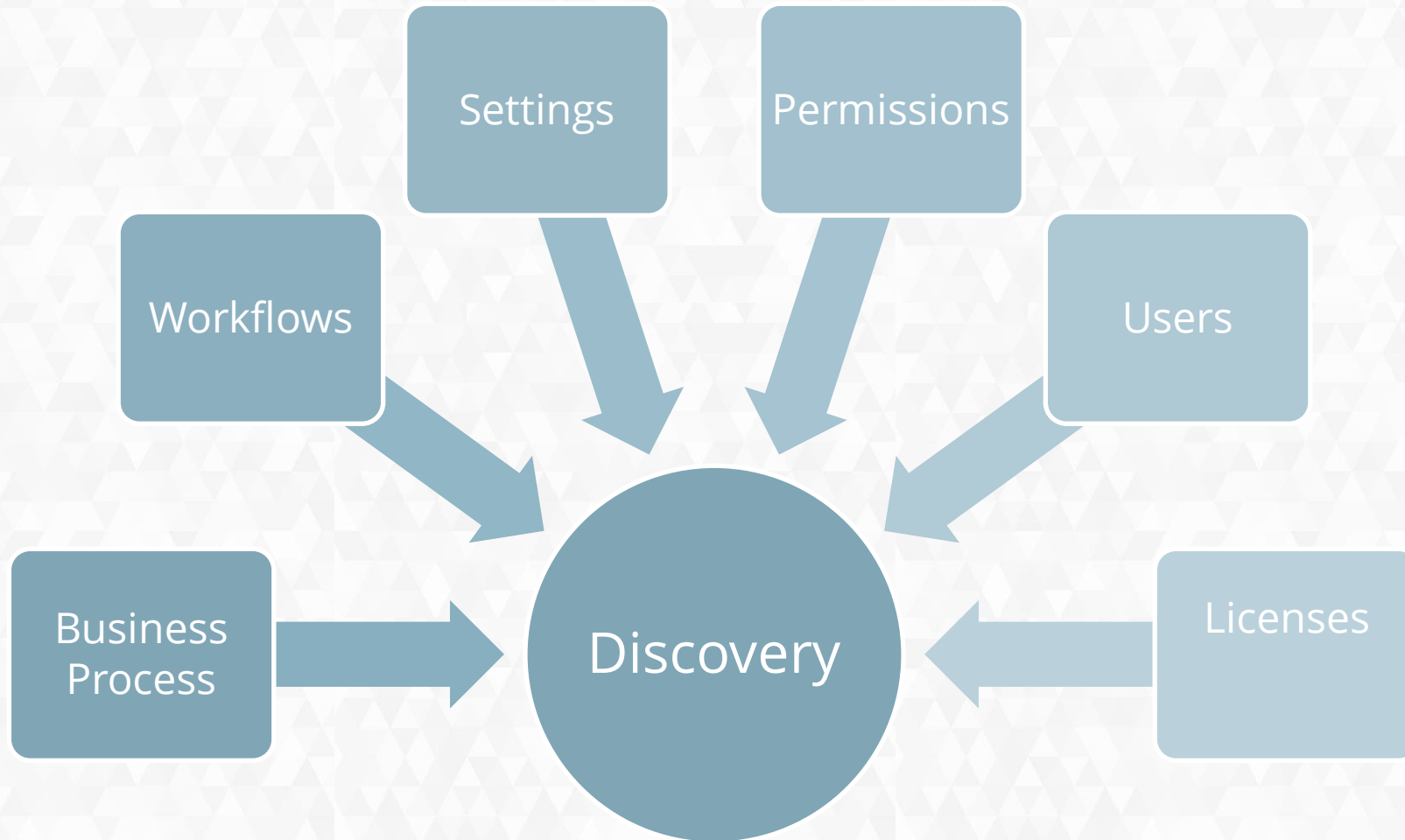
License Costs

Reconciliations  
between  
tenants

"Right"  
Approach



# Discovery – not just content!



# Discover configurations (beta)

The screenshot displays the 'elements' dashboard, powered by AvePoint, with a sidebar containing navigation links: Dashboard, Customer Directory, Reports, Settings, and Gemini. The main content area shows three cards: 'Settings Template', 'Job Monitor', and 'Customer App Profile'. A red line connects the 'Settings Template' card to three circular callouts illustrating the configuration steps:

- 1. Basic Information**: This step includes fields for 'Template Name' (set to 'Tenant Settings'), 'Description', and 'Select a Customer Tenant to Export Settings' (set to 'Gemini Master Tenant'). It also shows 'Email Address' (avetest001@126.com), 'Customer App Authentication' (Configured), and 'Service Account Authentication' (Configured).
- 2. Module Settings**: This step involves selecting modules for export. The selected modules are: Azure Active Directory (Azure AD), Microsoft Intune, Exchange Online, SharePoint Online, OneDrive for Business, and Microsoft Teams. A text box allows specifying users to export settings for.
- 3. Settings**: This step shows a list of settings to configure, including: Active Directory (A), User Creation, Group Creation, Company Branding, Self-service Password Reset (SSPR), External Collaboration, Security Defaults, Enrollment, Compliance Policy, Conditional Access, and Configuration Profile.

The 'Next' button is visible at the bottom of the configuration steps.





# Discover licenses

MOD Administrator


Dashboard

Tenants:All

User container groups:All

Synchronizing license and user information...

License summary



Purchased licenses	735
Assigned licenses	421
Available licenses	314
Free licenses	20060003

Licenses consumed by inactive users

63

62

61

INFORMATION\_ PROTECTION...

OFFICE 365 E5

ENTERPRISE M OBILITY + SEC...

View all

MOD Administrator


Dashboard

Tenants:All

User container groups:All

Synchronizing license and user information...

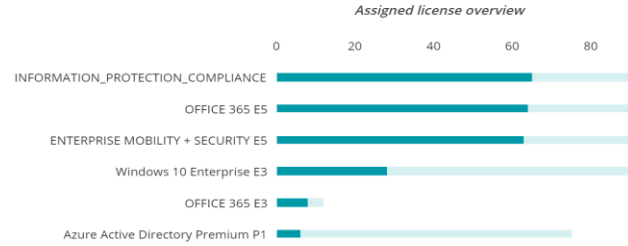
License summary



Purchased licenses	735
Assigned licenses	421
Available licenses	314
Free licenses	20060003

License consumption

Assigned license overview



Search by name

☒ All

☒ 12121

☒ 2323

☒ 5248\_M

☒ 5791\_2

☒ 5791\_A

☒ A

☒ adele&nina

☒ all

☒ colin51372

☒ delete1

Cancel

Apply

Licenses

61

ENTERPRISE MOB ILITY + SECURIT...

View all

Cost ranking (for the current month)

1

Microsoft 365 Domestic and International ...

2

INFORMATION\_PROTECTION\_COMPLIANCE

3

Microsoft 365 Audio Conferencing

4

ENTERPRISE MOBILITY + SECURITY E5

5

Windows 10 Enterprise E3

time of 'admin@M365x905791.onmic...

OFFICE 365 E3:

Microsoft Teams

1 month 7 days ago

Yammer for the Starship Enterprise

No activities

Skype for Business Online Standalone Plan 2

No activities

SharePoint Online

1 month 21 days ago

Exchange Plan

No activities

OFFICE 365 E5:

Microsoft Teams

1 month 7 days ago

Yammer for the Starship Enterprise

No activities

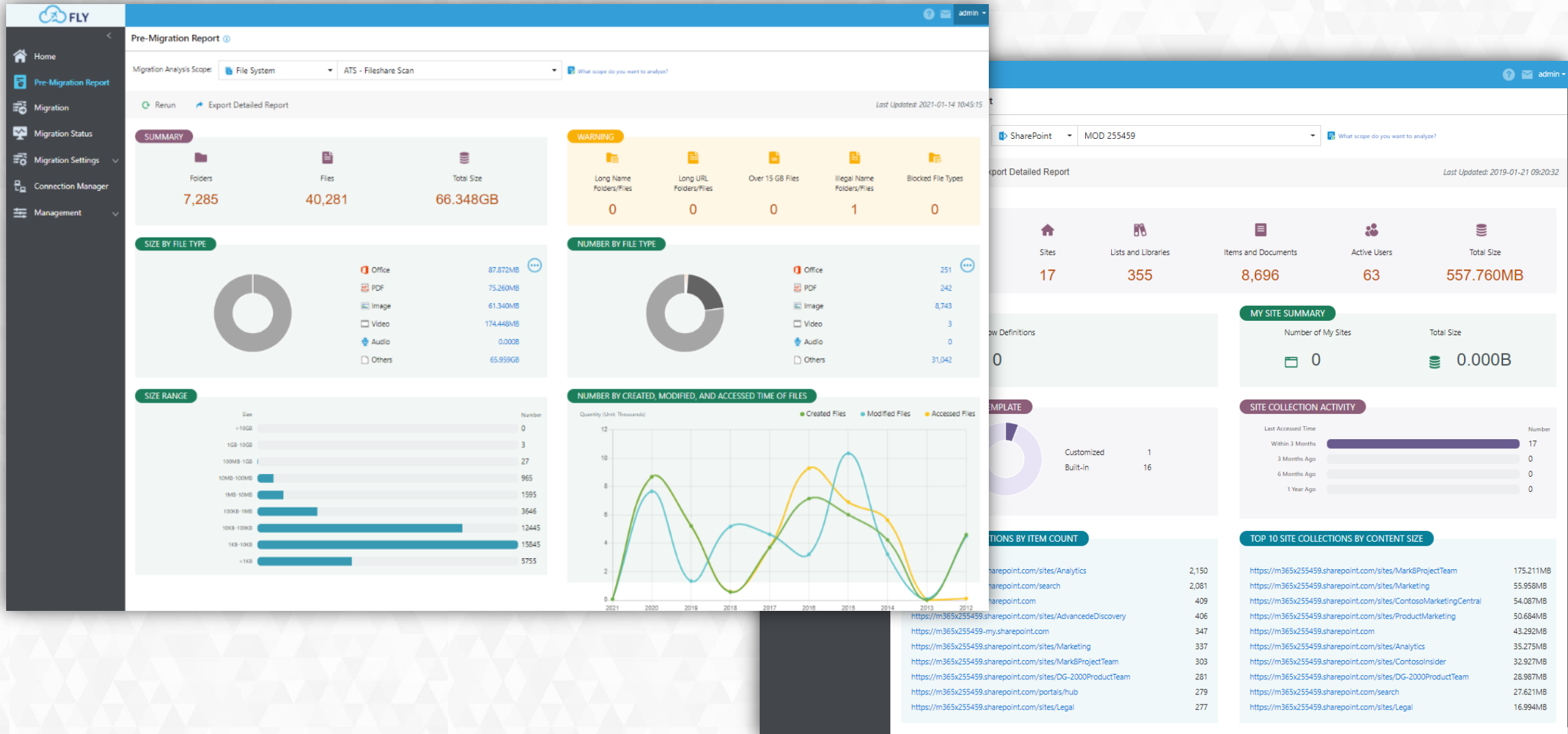
Skype for Business Online Standalone Plan 2

No activities

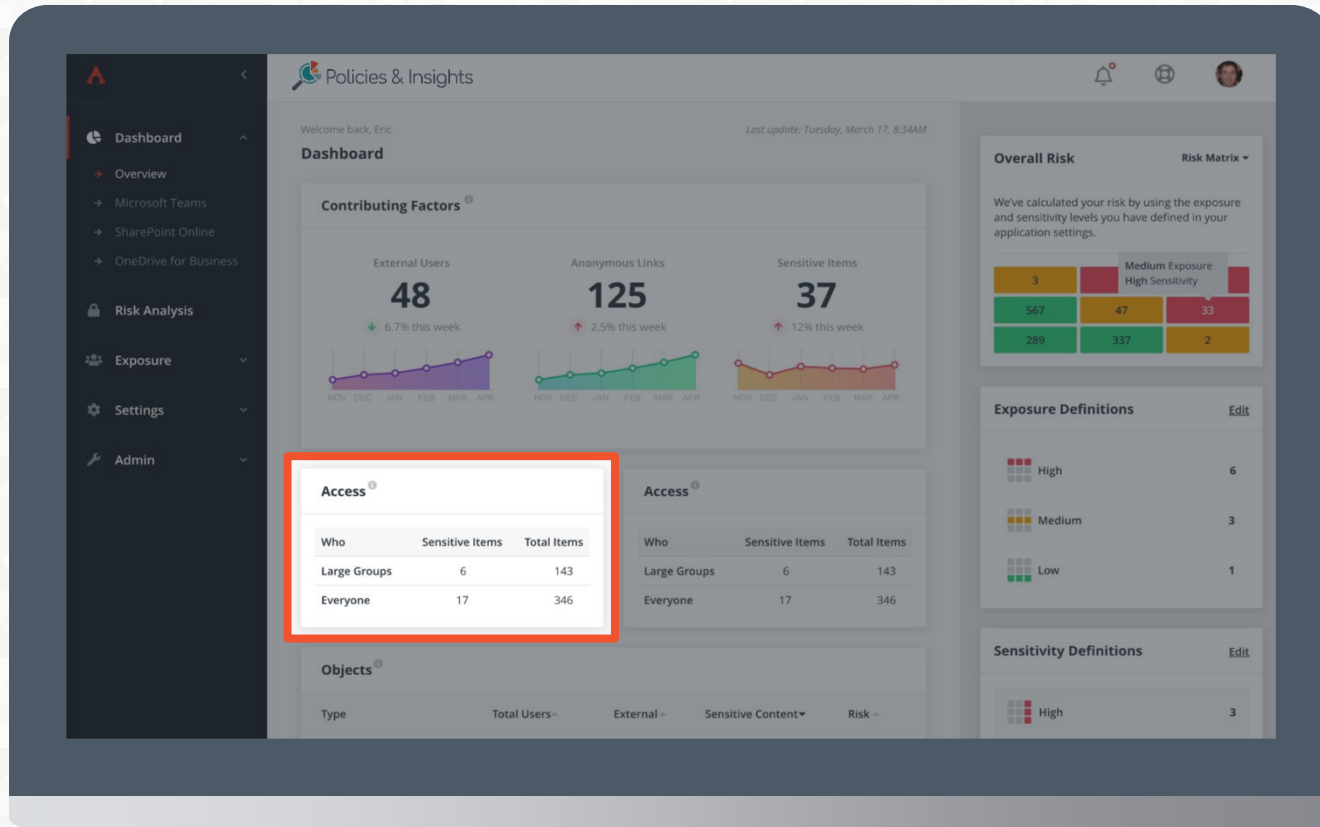
Manage licenses



# Discover IA and content



# Discover sensitive business data



Highlighting high-risk data and users in your environment

Work with native Microsoft sensitive information types\*

\*(Office 365 E3 feature)



# Discovery output: The Plan

- Based on outputs of discovery
- Is my source ready
- Understanding the gaps
- Who is going to move first
- What does my throughput look like
- How long are my sprints



# Your plan MUST include Change Management

## Training Week: Schedule Example

	MON	TUE	WED	THU	FRI
9:00					
10:00					
11:00				RVA311 General Updates	
12:00					
13:00			RVA311 General Updates		RVA311 Reporting Updates
14:00					
15:00		RVA311 General Updates		RVA311 Reporting	
16:00					
17:00					

### General Updates (Service Owners / Engineers)

- Overview of RVA311 major updates:
  - Look-and-feel update
  - Mobile app update
  - Overview of recent sprint changes/features
  - Details on Launch Dates
- Approx. 30 mins
- Delivered Online (Teams)
- 1x Deck, run 3x times for availability of audience

### Reporting Updates (Reporting Users / Managers)

## High-Level Communication Plan

T-7 Weeks	T-6 Weeks	T-5 Weeks	T-3 Weeks	T-1 Week	Service Available	T+1 Week	T+ 2~12 Weeks
<ul style="list-style-type: none"><li>All company email (delivered by <b>Sponsor</b>). First touch event outlining the business reason for change and the approach that is being undertaken.</li><li>Introduce the Ambassadors and Change Champion program</li><li>Introduce the availability of the web site and outline how this will include answers to common questions.</li><li>Tell them who they need to contact with issues or questions.</li></ul>	<ul style="list-style-type: none"><li>Give users a similar communication to the T-4 week version, which is intended to remind them of the business reason for change (delivered by Sponsors – Personalized for each community)</li><li>Senior Managers communication teams – continuing the theme - business reason for change outlining specific impacts (leverage Persona and Workforce analysis).</li></ul>	<ul style="list-style-type: none"><li>Sponsor delivers All hands briefing (face to face)</li><li>Managers begin communicating directly with employees using</li></ul>	<ul style="list-style-type: none"><li>Auditorium Training</li><li>Poster refreshed</li></ul>	<ul style="list-style-type: none"><li>2<sup>nd</sup> Auditorium Training</li><li>Poster refreshed</li><li>Brown Bag sessions delivered</li><li>Online / on demand training available</li></ul>	<ul style="list-style-type: none"><li>Early Adopter video</li><li>Lunch and Learn</li><li>Tips and Tricks</li><li>Podcast (per community) delivered by Sponsor</li></ul>	<ul style="list-style-type: none"><li>Lunch and learn</li><li>Posters refreshed</li><li>Rewards winners notified</li><li>Rewards announcements included in Newsletter</li></ul>	<ul style="list-style-type: none"><li>Lunch and learn</li><li>Posters refreshed</li><li>Reward winners notified</li><li>Reward announcements included in Newsletter</li></ul>

## Internal Training Approach



**Sprint 1: New Features**  
• Train the Trainer  
System Admins / Key Stakeholders

**Sprint 2: New Features**  
• Train the Trainer  
System Admins / Key Stakeholders

**Sprint 3: New Features**  
• Train the Trainer  
System Admins / Key Stakeholders

### Pre-Launch Training:

- General Training (Webinar)**  
Same system – new look and feel, Overview of all new changes, System Owners, Engineers, General System User Awareness
- Reporting Training (Webinar)**  
Changes/Addition to PowerBI Reporting Users, Data Analysts, Managers, General Reporting Users
- Email Blast (Email)**  
Recap of Changes, Call-to-action for Training All users who use RVA311 or need to attend training

Already Completed / Already in Progress

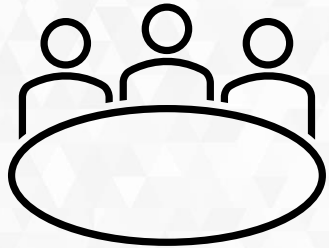
Details on Next Slide

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# Communication: Win (Internal) Hearts and Minds

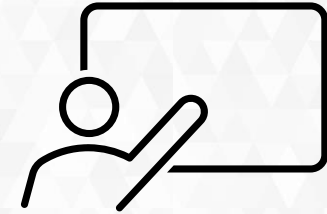


Don't forget  
about the impact  
to your users

Build a plan to  
prepare them

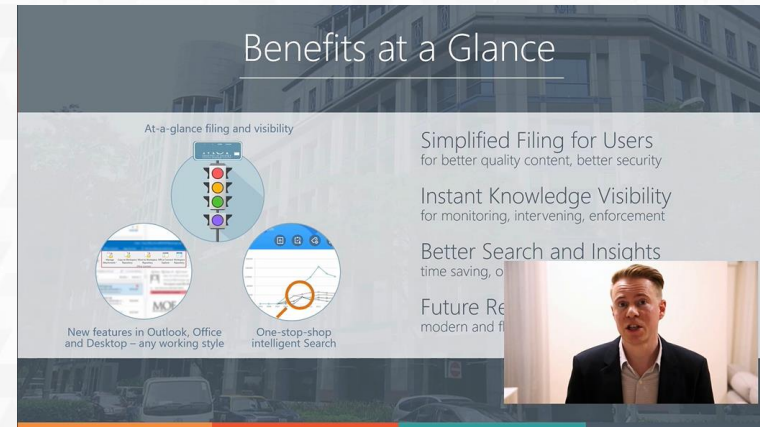
How do they  
learn best

Co-  
existence/cutover



# Training and Change Campaign Examples:

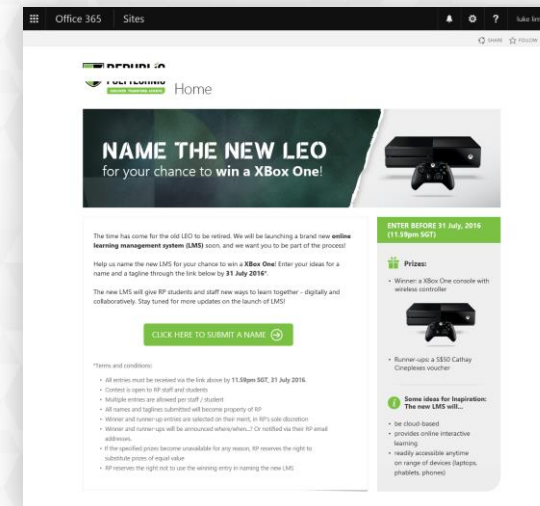
## Previous examples of Awareness Campaigns



## Training Videos



## Flyers



## Microsite

## Custom Emails



# *Putting the plan to work through your transformation kick-off*

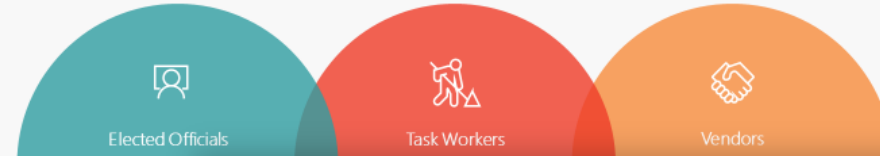


Divestitures  
Spin-offs,  
Carve-outs

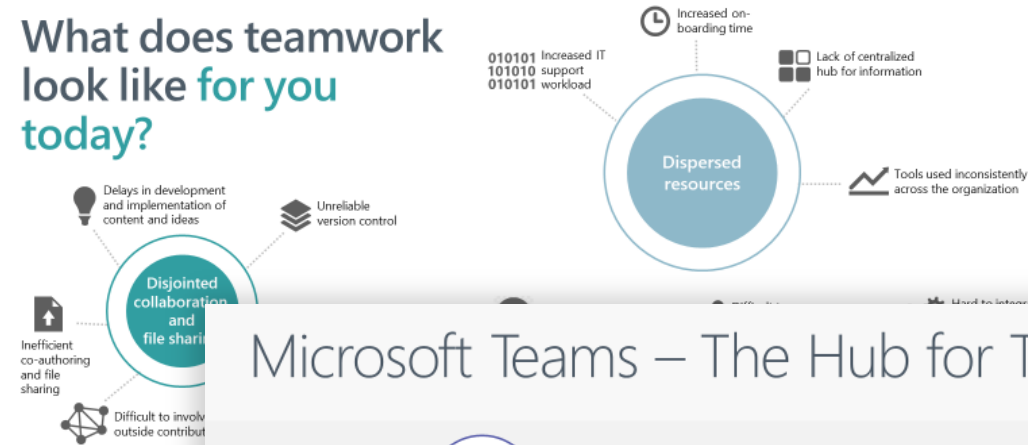


# Your target: The modern workspace

## Today's modern workforce



## What does teamwork look like for you today?



## Microsoft Teams – The Hub for Teamwork



- Communicate:** Chat, calls & meetings for today's teams
- Collaborate:** Deeply integrated Office 365 apps
- Customize & Extend:** 3rd party apps & existing systems
- Work w/ Confidence:** Enterprise security, compliance & manageability

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# Challenges in migrating to Teams



## Data Identification

- Identifying scope clearly
- Moving content per regulatory/compliance concerns?
- Migration performed by IT who are not owners of data



## Performance & Capacity

- Throughput required
- Impact on source / destination and network



## Timelines

- How long will your migration take?
- Do you have deadlines?
- Ensuring all required content was exported in time



## Object Conversion

- What restructuring or transformations will need to occur during the migration?



## New Technology

- Adoption resistance and process resistance
- Teaching users how to find migrated content



## Validation of Content

- Migration reports must be checked against extraction reports to ensure completeness of migration





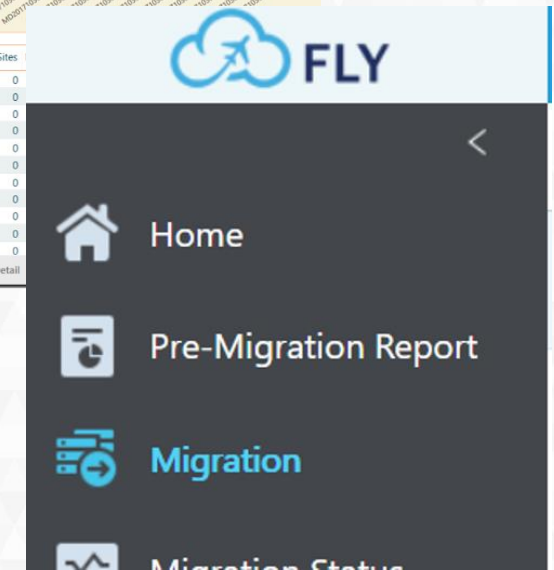
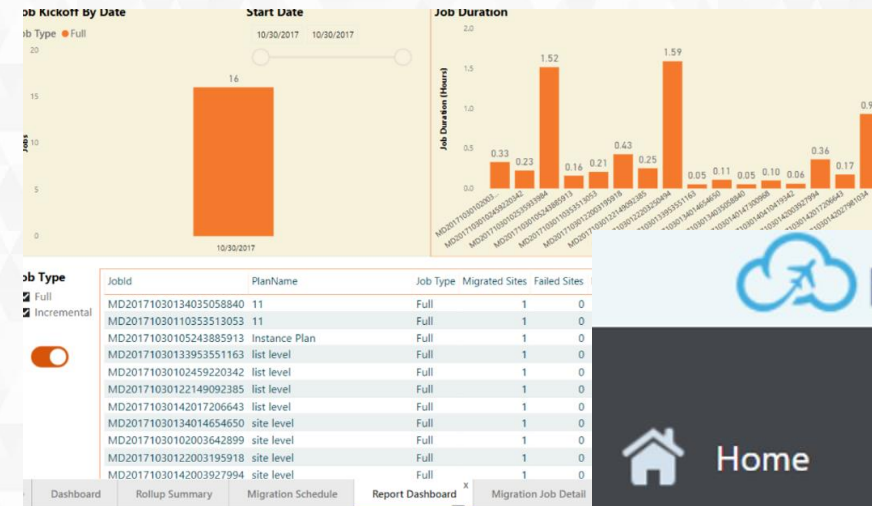
# Migration Execution

Waved Execution vs Big Bang

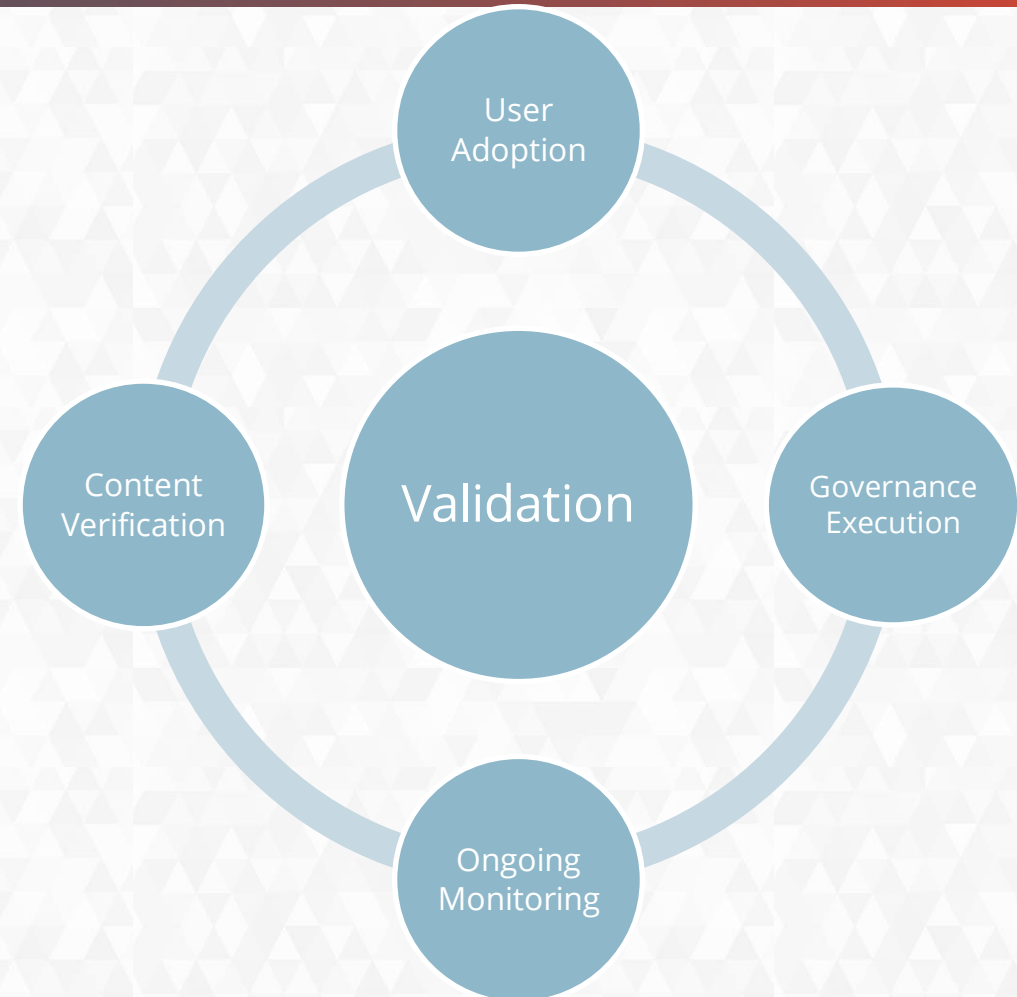
"Best Practice" Tooling

Monitoring and reporting

Exception Handling



# Post-Migration



# Planning for Sustainable Adoption

*Sharing experiences and strategies for Teams rollout and adoption*

## Resistance Management Techniques

- Empathy – Listen and understand objections
- Focus on the
- Remove barriers
- Provide simple consequences
- Create hope
- Show benefits
- Make a personal connection
- Convert the situation
- Create a sacred space
- Find a motivator



## Sustainable Adoption Objectives

Impacted Business Activities

Impacted People

- Minimize the negative impact of making technology changes

## Build capability through **varying methods**



DAY 1

Crawl



DAY 2

Walk



DAY 3

Run

Onsite Training



Virtual Training



Self-Help Resources



Live Support



Champions Network

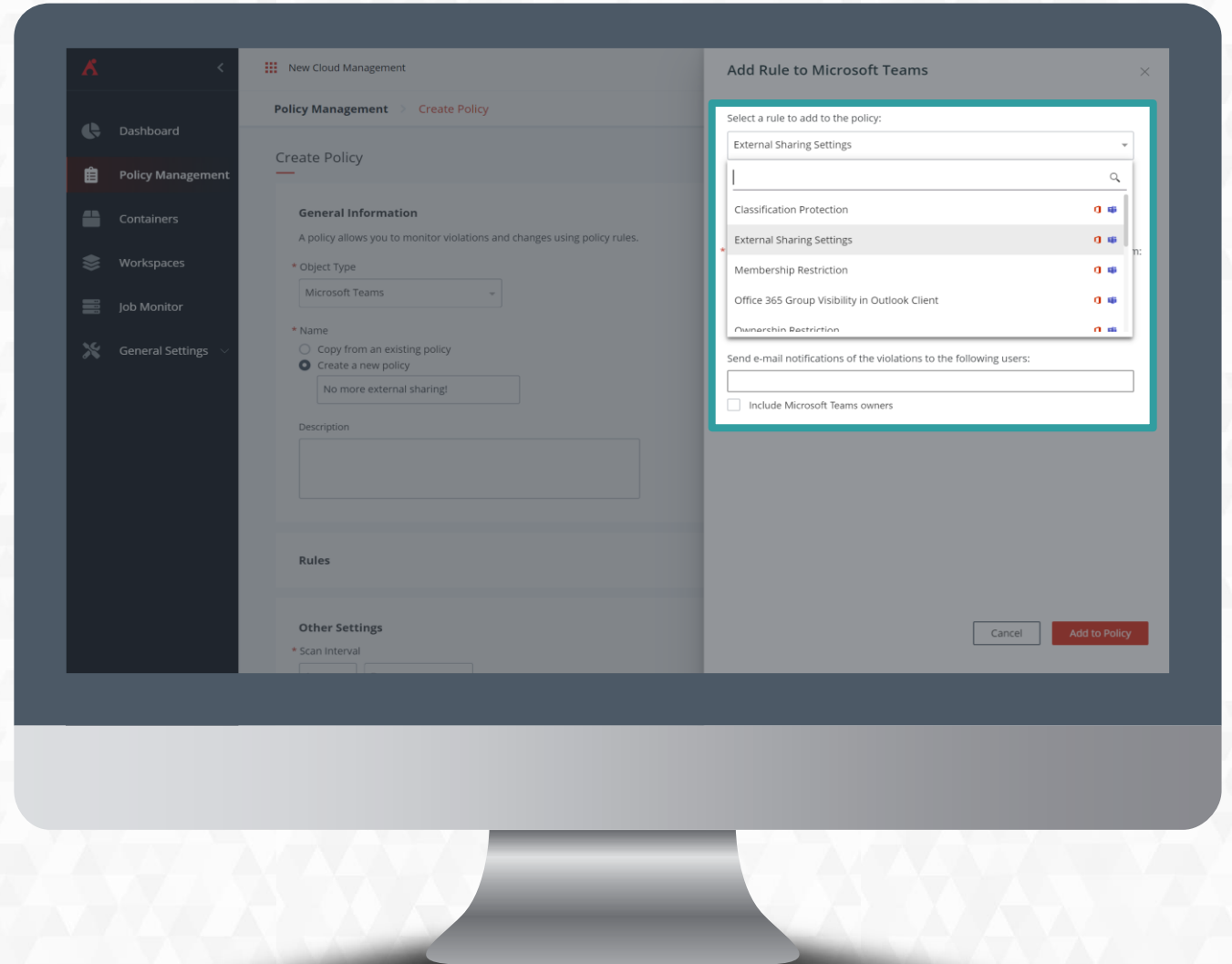


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# Post-migration monitoring, policies, automation

Craft policies that can adapt to the way your teams work and block the most common risks in your Microsoft 365 environment!



# Summary: How AvePoint can help

## Mitigate disruption & errors

Detailed discovery and plan preparation

## Protect the core

Prioritize key business units

## Growth thru innovation

Back to business with upgraded collaboration



Elements PRO (beta!)  
Cense (new!)  
Fly  
Policies & Insights (PI)

Fly  
Cloud Backup  
Policies & Insights (PI)

PI  
Cloud Governance (maybe!)

*M&A Concierge via AvePoint Client Services*





*What's next?*

*Keep reading blogs*

*Schedule a  
consultation*

*Schedule a demo*





**Collaborate with Confidence**