


Customer Location

Newark, NJ

Industry

Financial Services

Platform

Office 365

Solution

Cloud Governance

Critical Needs

- Control over Microsoft Teams and site sprawl
- Mitigation of IT burden
- Quick reports on Group ownership and permissions

“We tried about four other companies with a whole proof of concept and analysis. We knew we needed help with multiple things – reporting, governance, management, etc. – and AvePoint was the only provider to really cover it all.”

Robert Young
Prudential Financial
IT Engineer

Prudential Financial Controls Microsoft Teams Sprawl With Cloud Governance

Success Highlights

- Prevented Microsoft Teams sprawl with an automatic ticketing system for provisioning
- Created site and team ownership with automatic renewal policies
- Reduced average weekly site and team provisioning requests that have to be manually handled by the IT team from 35 to 3

Customer Profile

With operations in the United States, Asia, Europe, and Latin America, Prudential Financial provides customers with a variety of products and services, including life insurance, annuities, retirement-related services, mutual funds and investment management.

As a Fortune Global 500 company, Prudential has experienced extensive growth since their arrival in Office 365 in 2017. They maintain about 63,000 Office 365 seats with five terabytes of data in their SharePoint Online environment and 17 terabytes in OneDrive for Business.

The Challenge

Before executing their migration to Office 365, Prudential’s on-premise environment – approximately 400 sites collections – was quickly becoming unmanageable. Once in the cloud, the sprawl of their environment accelerated and began to impede adoption of Office 365.

“We were receiving at least 25 Teams and about 10 SharePoint Online site requests every week, which quickly resulted in a lot of work for our IT team,” said Robert Young, IT Engineer at Prudential.

As a result, Prudential began a very comprehensive and deliberate search for a governance solution to help control workspace provisioning and assist with reporting.

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The AvePoint Solution

Cloud Governance can automate almost any policy or procedure in an Office 365 environment, like Microsoft Teams, by guiding the Group creation process through a self-serving form-based website.

"Every new team or SharePoint site is managed by Cloud Governance. When someone needs help from my team, we now have a ticketing system. Now they simply fill out a form, and the provisioning system will control the creation and approval for us," said Young.

Cloud Governance has the functionality to automatically enforce critical governance components of a team or site such as naming conventions, lifecycle, permissions, ownership and much more.

Prudential has started with a simple implementation of Cloud Governance to realize immediate value, but is planning to leverage the tool further to enforce more granular governance policies.

"We haven't gotten too complex, but definitely plan on it. Right now, all our sites have been deemed internal with no PII (personally identifiable information) or sensitive information... We are planning on looking into different policies based on the level of sensitivity," said Young. "Currently, we have a single team provisioning process. Everyone can request the same team with a 50-gigabyte limit. However, we have set it up on the back end to automatically be approved for directors and above."

Additionally, Prudential is planning on leveraging Cloud Governance to securely enable external collaboration.

"We will also be opening external sites to collaborate with vendors on work, which will need heavy management. We currently block all users from adding any external users to anything. They have to come through IT and management directly," said Young.

Prudential has also decided to force and create a sense of ownership for sites and teams through automating a renewal policy.

Young explains, "We set up Cloud Governance policies to put a renewal profile against sites and teams. We are getting more requests asking which sites belong to which users. This policy and easy reporting have helped us understand and create ownership."

Prudential's North American tenant has been so successful with Cloud Governance, the company plans to integrate it globally.

"Our Japanese tenant is a completely different entity. They are rolling everything out in Office 365, but will also be using Cloud Governance by following our North American strategy," said Young.

The Bottom Line

Since Prudential's implementation of Cloud Governance, they have been able to quickly adopt Microsoft Teams and save IT management time.

"Cloud Governance has definitely given us more confidence... it has made us comfortable rolling out Teams and it actually happened very quickly," said Young. "Technical Support has also been really great. We get great customer services and are constantly shown status updates."

About AvePoint

AvePoint accelerates your digital transformation success. Over 16,000 customers and 6 million cloud users worldwide trust AvePoint software and services for their data migration, management, and protection needs.

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