

## “Thousands of pounds” saved in move to cloud IT with Microsoft Office 365

Edmund Carr chartered accountants has taken the first stride towards moving their entire business to the cloud. Cloud Direct, the cloud solutions provider (CSP), seamlessly migrated their emails, contacts and calendars from their local server to Microsoft Office 365 Exchange Online, Microsoft’s cloud email.

Staff can now move easily from one office to another – and can access Exchange Online from up to five devices from anywhere. The firm also feels at less of a risk from cyber-attack, now they’re protected with Microsoft ISO accredited security and 99.9 percent uptime guarantee.

### Key points

- Cloud allows staff and business cohesion during multi-site growth
- Trust in Microsoft security gives peace of mind against cyber-threats
- Email migration was so smooth, employees didn’t even notice
- Ultimately, servers will all be replaced by cloud for full migration
- Business saves thousands of pounds in subscription costs

### Background

Founded in 1953, Edmund Carr is a well-established firm of chartered accountants in Chelmsford. The firm offers a comprehensive range of business advice and accountancy services to individuals and businesses throughout the southeast and beyond.

The firm’s eight partners employ 50-plus staff in the accountancy practice combined with their smaller, financial services department.

Over the past 25 years, the firm has moved from one business server to several servers, each playing its own specific role – for example one was for Exchange, another SQL and another for tax, accounting and files storage programs. Five years ago they virtualised all their servers.

More recently, as business software and apps increasingly move away from the desktop and towards the cloud, the partners began focusing their minds on transforming their business technology. They decided to move their entire business to the cloud, one step at a time.

The business mainly uses Microsoft Office Word and specialised accountancy software. Having received emails from Cloud Direct on the subject over the months and conducted their own research, the firm decided that an initial email migration from their Outlook Exchange server to Microsoft Office 365 Exchange Online was the obvious first step.

“  
**We’re busy professionals. We don’t want to spend our time on IT. We want to be servicing our customers.**  
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**Stewart Martin**  
Partner  
Edmund Carr



# The challenge

## **Security: data protection, including cyber-risk management**

Security was a key priority for the business, especially in light of the increasing global threat of cyber-attacks such as ransomware viruses. Although they had existing defences and backup in place, they wanted to modernise their technology for a higher level of protection of their business data and systems, particularly sensitive client information.

## **Compliance: to meet industry regulations**

To meet the financial services stringent regulations, Edmund Carr needed a proven cloud IT partner able to deliver the trusted levels required.

## **Flexibility for business change, growth and employee mobility**

As the business grows, employees are increasingly moving to a second office space, where the financial services department has relocated. Partners wanted employees to be able to just pick up and go without having to waste time and resources on cumbersome IT transitions.

At the same time, they didn't want employees to feel isolated in the secondary office, so wanted a cohesive IT solution for seamless computer and phone communications.

## **Cost-efficiency: a scalable solution with low capital expenditure (CapEx)**

Edmund Carr wanted to avoid having to invest capital in new and expensive licences, servers and infrastructure. Rather than their existing CapEx model, they wanted to start managing costs more efficiently using an Operating Expenditure (OpEx) model and monthly cloud subscription.

Stewart Martin, IT partner at Edmund Carr said:

"We have a great IT supplier but, in terms of having confidence in a seamless migration of all of our email, calendars and contacts, we wanted to investigate a pure-play cloud company – one whose people spend all day every day migrating and managing cloud services."

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# The solution

During discussions with Cloud Direct, Stewart found confidence in the company's many years of experience: over the past 12 years, Cloud Direct has migrated 4,000 organisations to the cloud.

Similarly, Cloud Direct is a tier-one Microsoft gold cloud solutions provider (CSP) partner for small to midsize businesses. This was a big tick in the 'trust' box for Edmund Carr.

At the same time, this level of partnership with Microsoft gives the business access to selective offers, such as the one Cloud Direct was able to offer Edmund Carr, whereby Microsoft would contribute towards the bill for Cloud Direct's professional services migration consultancy.

After a 'sanity check' with their existing, traditional IT supplier, the firm asked Cloud Direct to steer them on their first step towards full cloud migration with Office 365 Exchange Online.

## **Employee productivity with Exchange Online**

Edmund Carr staff can now work whether they want, however they want. Exchange Online is integrated with Outlook, so they use this familiar application to access their emails, calendars and contacts on their desktop or laptop.



With Office Online, they can use their email on a web browser on any computer. Mobile apps give them seamless access to their mail on any computer, laptop, tablet or smartphone such as Windows Phone, iPhone, Android or Blackberry.

Staff can be productive and part of the team no matter which office they're in, or if they're travelling or working from home. They now have 50 GB mailboxes and can send messages up to 150 MB in size if required. Every employee can access exactly the same resources as they could as if they were in the main office, including global address lists, tasks or shared calendars to schedule meetings, book meeting rooms or other resources.

### **Compliance, accreditations and standards**

Backed with guaranteed SLAs, Cloud Direct is compliant with the Data Protection Act and the Financial Conduct Authority's (FCA) regulations. It was one of the first businesses to be awarded the latest ISO 27001:2013 to meet and exceed the level of security required by a highly regulated chartered accountancy firm such as Edmund Carr.

### **Data protection and security**

Security is one of the most important features of Office 365, which has been designed with two key security categories: features that are built into the Office 365 service, and customer controls, where Edmund Carr can tailor Office 365 to meet their specific needs as the business or industry regulations change.

Physically, the firm's email, contact and calendar data is now hosted in Microsoft's secure data centres, where data is protected from natural disaster or unauthorised access. Data centres are monitored 24/7/365 with video surveillance, motion sensors and onsite security officers. Access is strictly monitored and controlled by multiple authentication processes, including biometric scanning. Automatic extinguishing systems protect data against fire.

### **Cyber-threat and virus detection**

Microsoft has teams of threat management experts that constantly monitor Edmund Carr's data – anticipating and preventing security threats to help avoid malicious access and cyber-crime such as ransomware attempts. They use the latest anti-malware and spam filtering services that protect the firm from viruses and phishing attacks in the cloud before they reach their email system.

### **Service reliability**

Office 365 comes with a 99.9 per cent uptime guarantee so Edmund Carr is assured of a system that is up and running when they need it to be. This is guaranteed with a financially-backed SLA, supported by best practices in design and operations, such as redundancy, resiliency, distributed services and monitoring.

### **Business continuity and disaster recovery**

In the unlikely event of something going wrong with the business – such as flood, fire or cybercrime – Edmund Carr now has peace of mind that they can rely on Office 365 for access to emails, contacts, calendars and files. And since staff can work from anywhere, on multiple devices, they can keep on working if disaster strikes.

### **Cost-savings with Office 365 from Cloud Direct**

The special partner relationship with Microsoft allowed Edmund Carr to take advantage of thousands of pounds of professional services subsidies and subscription rates to replace their old licensing agreements.

“  
As a cloud specialist,  
Cloud Direct made migration easy

”  
Stewart Martin  
Partner  
Edmund Carr



They avoided significant investment and management overheads while still benefiting from all the capabilities of Exchange Server – without the need to buy, upgrade or manage their own hardware or associated costs.

### **A smooth migration to cloud email**

Stewart said:

**“The whole migration process was run and explained so that I could understand it – with minimum input from me. That we were able to make use of the Microsoft/Cloud Direct partner offer was brilliant – we saved thousands of pounds.**

**“At the changeover point, we really didn’t notice the move to Exchange Online. Everyone just logged out and back in again, as instructed. It was no different at all. It really was fantastic. I can always tell when things aren’t going well as I get lots of phone calls. On our cutover day, there was a distinct lack of calls – a good sign of how smoothly things went.**

**“We had a few questions for the Cloud Direct team on the day, which they answered quickly – it was all fairly straightforward.”**

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## **Results**

Stewart said:

**“With Exchange Online it’s so much easier to pick up sticks and move people – and then it’s just like we’re all in the same office – two great advantages of cloud-based systems.**

**“Since our migration, Cloud Direct has been very quick to follow up with ongoing support, advice and services.**

**“Stability has been very good. I give a big tick for security, as Microsoft has big networks and defences, so we know the backup and support is going to be there. I did have some initial doubts about whether the cloud version might be the kind of cut-down solution like the one you used to get with the old web app – but you don’t with Exchange Online – this is fully functional.”**

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## **Future plans**

Stewart said:

**“In time, we’ll start introducing the other components of Office 365 such as Yammer, SharePoint and Skype for Business.**

**“Hopefully, as we grow, people will literally just pick up their computers and move to another building. I know I’m happy that will happen now and there’ll be no issues.”**



## About Cloud Direct

Founded in 2003, Cloud Direct has freed 4,000 organisations from the risk and complexity of integrating multiple IT vendors. Cloud Direct pre-packages cloud technologies into proven industry solutions so customers benefit from full-service IT, quickly and safely.

Cloud Direct's packaged cloud service comes with one monthly bill and an award-winning, 24/7 customer service team. Packaged cloud drives better business continuity, people productivity and guarantees the availability and security of infrastructure and applications.

Cloud Direct is ISO 270001: 2013 accredited and holds Investors in People – Gold.

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CASE STUDY

