



CASE STUDY

Fund Evaluation Group Strikes SharePoint Online Migration Gold Leveraging Templating



It did not start as an engagement for which Orchestry was going to be used. Orchestry came along as a happy accident that happened in the middle of the process."

– Stephen Wilson, Microsoft
365 Architect, PAIT Group

KEY HIGHLIGHTS:

200 hours

of enterprise
man-hours saved.

\$200,000 USD

cost savings in less than
six months.

400%

time saving on per portal
provisioning.

• Introducing Fund Evaluation Group

INDUSTRY:
FINANCE



Fund Evaluation Group (FEG) is an investment consultant firm that works primarily with non-profit organizations, helping to manage their endowments and foundations. Headquartered in Cincinnati, Ohio, with offices also in Dallas and Indianapolis, FEG works with clients whose assets under advisement range from less than \$25 million to greater than \$1 billion.

With more than thirty years of experience, FEG helps a wide range of clients in higher education, community foundations, religious groups and conservation organizations. The Fund Evaluation Group started following the employee stock option program in 2017 and is currently 100% employee owned.



In Partnership with the PAIT Group

PAIT Group digitally transforms your organization by delivering quality Microsoft 365 and SharePoint solutions. PAIT forms a team that is tightly integrated with organizations and deeply dedicated to ROI. PAIT's Microsoft 365 consultants go beyond standard project-based work to bring reliable, continual change and process improvements through mentoring & long-term partnerships. PAIT Group is a Microsoft certified consulting firm specializing in long term collaborative strategy, business process automation, and custom solution development for clients nationwide.

In the first quarter of 2021, the PAIT Group strengthened their client relationship with the Fund Evaluation Group (FEG) by onboarding Orchestra to streamline their migration from SharePoint Classic to Modern SharePoint Online. Orchestra became a part of the solution as a templating and customization tool to ease the transition and deliver a seamless, renewed platform.



The Migration Catalyst

As a full-service investment advisory firm, FEG empowers clients through investment excellence. Therefore, their client portals are integral to delivering a positive experience for all. Formerly based in Classic SharePoint, it was time for the FEG to make the transition towards a more secure and modern set up without having to maintain on-premises SharePoint servers, while also enabling multi-factor authentication on Modern SharePoint Online.

After their previous successful migration of their intranet to SharePoint Online with the PAIT Group, it was time for them to take the next step towards modernization.

FEG's SharePoint Modernization Objectives

The scale of the migration from SharePoint Classic to Modern SharePoint, coupled with the need for templated client sites was going to be daunting, especially due to the size and features of each client site. There were particular lists, libraries, and metadata that each client site would need to be prepopulated with, along with interactive and engaging web parts that offer a customized experience on each homepage of client sites, including critical account contact details.

The idea of creating something modern, engaging yet consistent across all client sites was of importance and among the primary objectives of the entire migration project.

The top priorities for this project were:



Seamless & efficient Classic SharePoint to Modern SharePoint migration.



Display advisor photos in client portals across Modern SharePoint Online.



Replicability of portals from SharePoint Classic to the new environment.



Specific & cookie cutter like templates that could be managed internally.



*The
SharePoint
migration
engagement
with FEG did
not initially
include
Orchestra.*

*Honestly, Orchestra
came along as a happy
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— Stephen Wilson, Microsoft
365 Architect, PAIT Group

Upon delving into Orchestra's capabilities at great depth, the PAIT Group also discovered Orchestra could save considerable man hours for both PAIT Group and FEG.

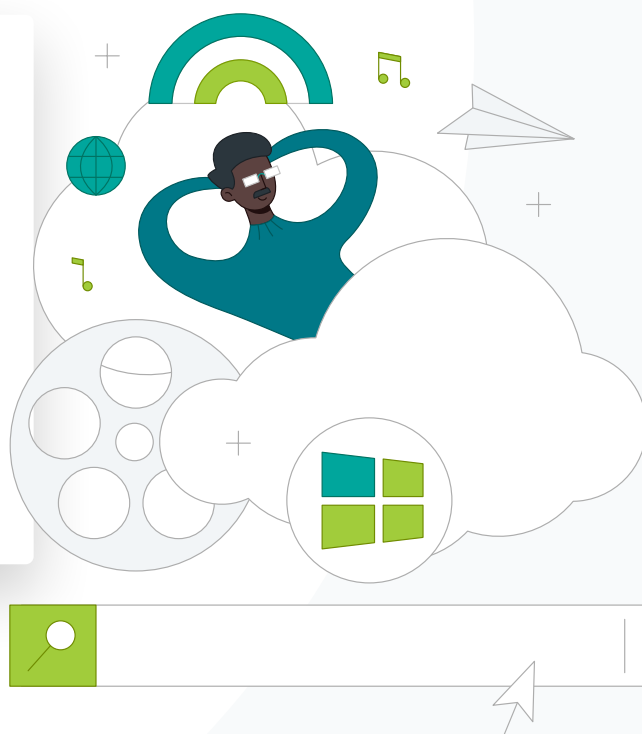
Including Orchestra as a critical component of FEG's Classic SharePoint to Modern SharePoint Online migration, the PAIT Group saved their client \$57,000 USD in cost savings, with over 300 man-hours saved.

The **\$57,000 USD of cost savings** was a significant factor in taking the project forward with Orchestra. From that point forward, the question became how Orchestra could be utilized to its fullest capabilities throughout this change management project.

**UTILIZING ORCHESTRY FOR
FEG'S MIGRATION FROM CLASSIC
SHAREPOINT TO MODERN
SHAREPOINT ONLINE YIELDED A
COST SAVINGS OF**

\$57,000 USD

**WITH INCLUSION OF THE FIRST YEAR
LICENSING FEES.**



With past experience of working with other third-party tools, the PAIT Group team was clearly taken by Orchestra.



We were delighted to present FEG with Orchestra after our initial run at the project with PowerShell scripts. Walking the team through Orchestra, you could see the instant relief of their faces that they were going to be able to administer this solution themselves moving forward."

— Ryan Keller, Senior SharePoint Architect, PAIT Group

“

Orchestra delivered the ability to create multiple portals.

To date, we have been able to redesign and provision 500 client portals in no time!”

– Michelle Poe,
IT Systems Manager,
Fund Evaluation Group

Simplified Site Templating and Customized Webparts

Previously, FEG leveraging the SharePoint On-Premises platform only permitted the creation of client sites, one portal at a time. With Orchestra, many portals could be created simultaneously, delivering enormous time savings.

“Orchestra gave us the ability to create multiple portals and although the plan was to take things slow, we were able to redesign portals and had about 500 client portals up and running in no time!” exclaimed, Michelle Poe, IT Systems Manager, Fund Evaluation Group.

The FEG team heavily utilizes Orchestra’s remarkable core capability, [Orchestra’s Pre-Built Workspace Templates](#). The option of Workspace Templates is particularly useful, setting up specific templates for certain types of portals. Previously, in the SharePoint On-Premises environment there was only one type of portal, which required extensive customization post provisioning. Hence, having multiple Workspace Templates in Orchestra for the Modern SharePoint environment is an outstanding time saver with no post-provisioning customization required.

The previous client portal creation in SharePoint On-Premises took approximately thirty minutes to set up. With Modern SharePoint leveraging Orchestra, the entire process to provision a new client portal from start to finish is only 6 minutes — **a 400% time saving per portal.**

With the original PowerShell script based solution for setting up client portals in Modern SharePoint Online, much manual entry would have been involved, along with a steep learning curve for FEG. Now with Orchestra’s Workspace Template capabilities, every piece of the template is copied over in mere minutes, yielding critical time savings for both FEG and the PAIT Group.

“As FEG has grown their client portals, their needs have changed slightly, requiring updates to the designated Workspace Templates. These updates have been super easy to make with Orchestry, only taking 15 to 30 minutes. Our original PowerShell solution would have required at least 4 hours to update a template without Orchestry,” shares Ryan Keller, Senior SharePoint Consultant at the PAIT Group.

Since the migration, the FEG team has created 500 client portals using Orchestry, recording a **200 hours time savings**. This total time savings from not requiring an enterprise employee to spend hours customizing portals, nor hiring an IT consultant to assist with PowerShell scripts, is equivalent to **\$200,000 USD cost savings** in less than six months.

A TOTAL COST SAVINGS OF
\$200,000
TO DATE USING ORCHESTRY

APPROXIMATELY
200 HOURS
OF ENTERPRISE
MAN-HOURS SAVED



Orchestry is a tool that you don't have to be an IT person or have technical expertise to use. The FEG team, without much of a SharePoint background, have utilized the platform without any hurdles and with enormous time savings,”

explained Joy Apple, Modern Workplace Strategist, PAIT Group.



As FEG created and managed multiple client sites, the [Orchestry Workspace Directory](#) was a very handy feature in helping them find the appropriate assets instantly. Without the Workspace Directory, the entire search experience of the platform would be frustrating for users. With its useful filters and personalization, the Workspace Directory provided great flexibility and efficiency in locating the required collaboration assets.

Customizing Authentication with the PAIT Group

The old method of client authentication to gain access to respective client portals was a form-based authentication system and the incoming information from it was stored in a database. The initial ask was to migrate authentication as is to Microsoft 365. However, the PAIT Group had a better option for managing external user logins into their new client portals.

Moving forward, the project involved the PAIT Group creating a custom authentication piece. With this, the first time an external user hit the customer landing site, they would get a pop of terms and conditions. It was a way to keep a record of those acknowledging those terms, along with the date and time of acknowledgement. The acknowledgement would then prompt the invitation to their new client site. The PAIT Group worked with FEG on how best to communicate and manage the change with both internal and external stakeholders to ensure no obstacles were created in authentication to the new portals.

Tackling the Challenges of Change Management

Every digital transformation project has its share of hurdles and FEG faced some too. This was nothing out of the ordinary as change management often faces some resistance from users. Some users had AOL email addresses which slowed down the adoption as they were unable to get access into the Microsoft environment.

In collaboration with the PAIT Group, FEG prepared support documents like instruction manuals and screenshots to remove the uncertainty of setting things up in a new platform. As they began collaborating in the modern space, the FEG team provided resources and support material that the rest of the organization was able to grasp with ease.

The Path Forward for FEG

FEG has started using Orchestra to grow their existing portal base as they onboard new clients. At the rate at which they are welcoming new customers, they are looking to create at least 25 new portals a year.

Joy Apple from the PAIT Group shares, “There is a lot for them to grow into, and I can see them growing into the governance aspect of Orchestra and making good use of it in their environment.”

Beyond the existing project, FEG also has a few other initiatives in the pipeline:



Manager Site Migration – FEG is in the process of a critical migration project that is currently in the planning stage, which aims to be a repository of documents from research managers.



Site of Recording – FEG is likely to have another site for all its recordings, like quality monitoring summaries and other reports that are stored on this SharePoint site. This project is currently on hold, but the preparation is underway.



Server Migration – FEG is also in the process of migrating all their servers online, into the cloud. FEG hopes that this is the first in the domino effect of projects that will soon follow.

Given that FEG is expecting to grow its client base in the coming year, with many upcoming technology projects on the horizon, the capabilities of Orchestra may be carried forward in these new initiatives as well.

“

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– Joy Apple, Modern Workplace Strategist, PAIT Group



The Orchestra — • Customer Experience



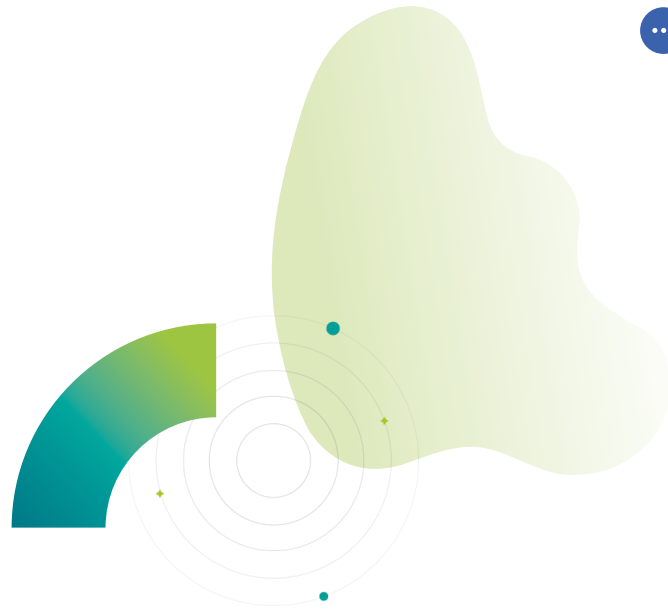
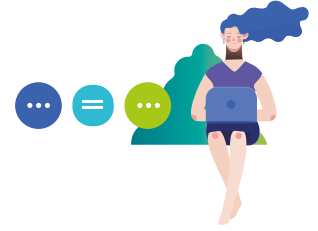
A happy surprise that came with Orchestra was FEG's newfound ability to add members to their internal security group. Prior to this, members were added manually, and the process had to be carried out for each portal created. Making Orchestra a part of the solution allowed FEG to circumvent manual tasks, saving them considerable time.

FEG has had some experience with third-party tools in their environment, such as Fly and Harmon.ie, so they were not new to exploring solutions beyond Microsoft's OOTB resources.

With that in mind, Michelle Poe of Fund Evaluation Group notes, "We were pleasantly surprised with how economical Orchestra turned out to be. We were expecting to pay a lot more, but Orchestra feels like a real value play in the market of third-party applications."

While the entire experience with using Orchestra was so seamless, the collaborative work with the PAIT Group is just as praiseworthy. The FEG team was extremely satisfied as the PAIT Group ensured the entire project was delivered on time, on-budget and on scope.

“ They were very flexible and understanding throughout the migration project. There were a couple of iterations in the beginning regarding how it would be approached, but the PAIT Group team was patient and attentive of our needs,” shares Michelle Poe, “The additional research, support and prompt responsiveness of the PAIT team made them a pleasure to work with.”



Work Made Simple with Orchestra

Orchestra is the all-encompassing adoption and engagement tool that organizations need for their Microsoft 365 environment. Bridging the gap between what is available out of the box and what businesses are searching for, Orchestra provides comprehensive change management support.

With core capabilities like Pre-Built Workspace Templates, Transparent Governance and Self-Service Provisioning, Orchestra enables a balanced collaborative space across Microsoft 365, allowing control to admins without creating bottlenecks for end users. Moreover, Pre-Configured Templating by Orchestra enables the standardized experience that benefits all users while eliminating the common confusion of 'what to use when' in Microsoft 365. In addition to those, the Informative Workspace Directory happens to be a key player in Orchestra's efficiency as it creates a repository of all assets in a unified interface.

Orchestra is embarking on its mission of WORK MADE SIMPLE in Microsoft 365, MS Teams and SharePoint Online, with its latest and most sought-after capability, Actionable Insights and Comprehensive Lifecycle Management.

Ask us how Orchestra can upgrade the management experience of your collaboration space at hello@orchestra.com or get FREE access at <https://www.orchestra.com>.