



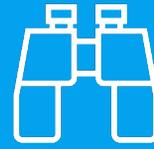
# Finchloom

100% Microsoft Focused Cloud  
Service Provider



## Introduction

Mergers and acquisitions (M&A) are an important, strategic lever for business growth. They can help companies acquire new technology to stay competitive, diversify their products and services, expand their customer base, and more. The success of the M&A depends on how quickly and efficiently you can integrate IT systems, data, and processing workflow.



## Mergers & Acquisitions

According to a [Harvard Business Review Report](#), between 70% and 90% of M&A projects fail. One of the reasons is the neglect of a proper IT integration strategy for mergers and acquisitions.

If you have acquired or merged with another organization, you will likely need to take on the highly complex consolidation of different IT platforms, specifically migrating or consolidating tenants. Nailing this migration and/or consolidation process is

highly critical to the success of the overall IT integration and M&A.

Maybe your business is using Microsoft 365 and has recently acquired another business that has its own separate Microsoft 365 tenant or is hosting its data and email in another platform altogether. Or maybe you are migrating from a system outside of Microsoft 365, like Google Workspace.

Whatever your situation may be, tenant migrations and

consolidations are extremely complex and when circumstances necessitate a consolidation, we have found that many times businesses do not know how to properly handle it, because for many businesses, this happens once in a blue moon.

Generally, there are 3 different situations where a business would need to migrate or consolidate.

- Switching from one system to another (i.e., moving mail from Google to Microsoft)
- A business acquisition where one tenant needs to be moved into another (from 'business A' into 'business B')
- A business merger where 2 tenants need to be combined into a 'master tenant'

Efficiency, security, and cost-consistently drive the need for technical migrations or consolidations. Regardless of the need, if your business has multiple sources of data and information, creating a master Microsoft 365 tenant and consolidating all data sources under your business umbrella will ultimately provide many benefits.

What are the some of the benefits of consolidating technologies and data into Microsoft 365? Aside from the standard thought of cost reduction through economies of scale, and successfully merging disparate technology platforms and systems, this can be a difficult question to answer. But there are many more benefits to consolidating than those we just listed that we will outline in this eBook.

But first, it is important that we address the risks of not consolidating. Understanding all the risk factors that your business will face in taking on this endeavor is also critical to success, as when technology systems are not properly migrated or consolidated, it can be detrimental to a business's productivity and employee satisfaction levels. Maintaining multi-tenant environments is complex and inevitably requires more resources than would be necessary after consolidation.

Multi-tenant environments pose an array of challenges both for the IT department as well as end users. Difficulties include increased

expenditure, security issues when logging out of one tenant and into another, the overall management of the two separate systems, and the unique configurations of both systems. Changes to one environment will have downstream impacts to the other environment that need to be considered or will risk user impacts. End users that must deal with several logins and application syncing, as well as general confusion when trying to collaborate with users in a different environment further inundating the service desk with calls for help. Without login syncing (which is not a permanent solution) users will have to log in to several separate places if they need to access data that is located on another tenant.

There is also the issue of communication and collaboration across several tenants both internally and externally. Multiple tenants within a single organization can and most likely will interfere with engagements across the tenants. If a user is logged into their Teams profile within a tenant, they won't see or be able to access the chats and files on the other unless they log out and then back into the other tenant or maintain two or more concurrent logins and are left juggling between multiple in-private browser windows.

YOU CAN'T  
HAVE

DIGITAL  
TRANSFORMATION  
WITHOUT

REAL  
COLLABORATION

Environments with multiple tenants exacerbate the IT team's duties for managing the (now multiple) tenants as it creates more points from which it needs to pull data. This can diminish IT savings and can drain IT resources as there is more of a need to manage each tenants' users and in doing so increases IT costs.

Here is an example scenario. Let's say that two companies come together with different practices and methodologies to store their data. After the merger is complete, the finance departments from each respective company want to begin sharing documents and information. One company operates using a Microsoft 365 tenant, and the other is using Google Workspace. Neither business can bring employees from the other into their storage areas due to security concerns, so instead they invest in a new technology altogether. Each department drops all necessary files into the shared box/area and now they can share data and files across their teams. Simultaneously, the human resources departments of each company face the same issue. They come together and decide to utilize a different technology than the finance department to share files. The process repeats, everyone adds their files into the shared drive, and now everyone has access.

Now what happens when someone in the finance department of one company must share data with the human resources department of the other? Both have invested in these external systems and cloud tools, but neither have access to the other. In this case, one of the departments would need to invest in yet another group of licenses for the technologies they have purchased, or maybe even decide on a different option altogether. This is a scenario that we have seen several times and can quickly be remedied by creating a shared space in Microsoft 365 (such as Microsoft Teams) and inviting external users to collaborate, but ultimately a consolidation into Microsoft 365 empowers users to easily and seamlessly create a place to communicate and collaborate without the need for guests or external sharing.



Consolidation =  
decreased costs,  
increased  
employee  
engagement

Ultimately, consolidating multiple Microsoft 365 tenants or disparate systems into a single environment provides numerous benefits that will keep employees happy and empower them to manage their teamwork in a simplified and modern way, free up IT resources, and ensure that your business is operationally adept. By consolidating into Microsoft 365, companies will see that their cloud operations and solutions run

more effectively, their costs will decrease and be more manageable, and engagement and collaboration will be improved.

# #1 Chapter 1

## 7 Helpful Tips to Ensure a Successful Tenant-to- Tenant Migration



## Tip #1

# Proper Planning is Key: Define the “To Be” Environment



To properly consolidate multiple sources of data and information, it is necessary to first look at all the requirements of the consolidating organizations. Within each business there are specific compliance, regulatory, and security factors that need to be considered and added to the final ‘master tenant.’ It is important to do this so that the end Microsoft 365 tenant is in a state that ultimately maintains the requirements set forth. Identifying all requirements necessary via in-depth analysis is critical in

beginning a merger, migration, or consolidation because there are innate complexities that lie within each individual system.

By frontloading analysis and design documentation, you ensure that the ‘to be’ environment meets all the organizations requirements, and that the consolidation or merger is done the right way the first time. Stop gap or band-aid approaches do not work in these situations.

## Tip #2

# Get your Business Involved to Leverage their Knowledge



Active collaboration between the business and the partner helping with migration and consolidation efforts can keep costs down and improve business knowledge of the new environment. Performing repeatable steps within your business to aid in the migration efforts will decrease the hours billed, and at the end of the day, it will be your business that will have to monitor and maintain the newly consolidated or migrated tenant, so being involved in the process is a great step towards learning how the new tenant will function.

Co-planning is also essential.  
Parsing up the project into what

the consolidating company will complete, and what the migration team will do can be a great learning experience for the migrating company.

Throughout each stage of the process, it is best to clearly identify which aspects of the project will be handled by the partner team, and which will be taken on by the client.

This is important so that the partner is fully aware of all the systems that are in place and so that both parties are aligned on responsibilities. We have found that in a variety of companies that are moving or removing

legacy data sources may impact back-office employee processes that have been in place for years, but have not been visible to the IT team. In one client situation we worked on, there was a program running in a Microsoft 365 tenant that was created by an employee who left several years before. In this instance, the IT team had no idea that this program existed as it was a one-off application that the employee had trained his replacement on before he exited. It is things like these that make the collaboration

between migration team and client critical.

Throughout the process of migration or consolidation, clients should have full visibility of the processes used and get to see and learn how consolidation works. Clients completing some of the work throughout the project will not only save billable hours (which in turn saves on project costs), but also provides an opportunity to learn about the new systems being implemented or rebuilt.

"Collaboration between the migration team and the client is critical."

## Tip #3

# Determine which Systems will need some extra Care



Many businesses automate their business processes in some regards. Whether by creating a shared mailbox so that users can access emails within a certain department, an automated email every time someone fills out a form on the website, or an excel document that is automatically updated with new values daily, there are certain aspects of migrations like these that need extra attention as to not break them.

Any automation should be reviewed carefully before migration, and a decision needs to

be made about whether it should be migrated (if feasible) or rebuilt. Depending on the starting location of the data being migrated, this can be simple or complex. If a business is consolidating 2 Microsoft 365 tenants, the process is straightforward. Anything that has been built within the migrating tenant can be easily moved or rebuilt on the new tenant as they use the same technologies.

On the other hand, if a company is migrating from Google Workspace into a Microsoft 365 Tenant,

the process is far more tedious than above. For example, if a company is utilizing the forms feature within Google, any automations within will be lost upon migrating, so the entire process will need to be rebuilt with the equivalent Microsoft technology as well as Power Automate.

Ultimately, it is important to identify which systems will need this kind of extra care in the initial planning phase of the migration or consolidation process.



## Tip #4

### Consolidate ALL of your systems



In some cases, a business might acquire other businesses that have already merged or acquired before without consolidating their own data and systems leading to quite a messy situation. When feasible, we recommend to always consolidate all business data and applications into a single master Microsoft 365 tenant.

Some businesses feel the need to keep their acquired tenants/data separate for a variety of reasons. Whether the proposed need to keep separate tenants or keep data separate is because they

have several authentication systems, collaboration sites, or mailboxes, what many businesses don't realize is all can be kept separate using virtual firewalls within a master Microsoft 365 tenant. Maintaining several different email domains within a single tenant is quite easy given the right guidance, and if you go the route of consolidating several tenants into one, you will reduce complexity, improve employee satisfaction, engagement and effectiveness. Consolidating also does not have to be the "be all end all".

If your business finds at some point that it needs to separate the tenant into several respective pieces, whether it be a divestiture or otherwise, it is possible to build the new master tenant in a way that simplifies this process if this option is on the table.

YOUR  
IDEAS

ARE

OUR  
INSPIRATION

## Tip #5

# Decide on the right Microsoft 365 or Office 365 License



Using the right tools and programs in today's business world to lower costs and increase efficiency is critical to maintaining your place in the market. Research and selection of the appropriate suite of Microsoft licenses can save costs in multiple ways. Whether your business needs full endpoint management, or requires specific compliance features, choosing the right license for your need can save IT team costs and overhead.

Taking the time to properly identify the licensing suite that is the best fit and meets

organizational requirements can eliminate the need for additional applications and contracts. Some licensing will also enable businesses to get rid of certain external programs (like antivirus for example) and bring it under their Microsoft umbrella. The IT team also benefits from the consistent ecosystem of integrated applications, reducing the need for one-off application expertise, which in turn, lowers staffing overhead.

## Tip #6

# Tenant Consolidation is Extremely Complex and should be handled ONLY by Experienced Professionals



Even if you have migrated or consolidated tenants several times, each situation is completely unique. Each consolidation should be treated differently based on the situation at hand and should be placed only in the care of highly-experience professionals. There are a variety of issues that can arise from migrations internally, or even with some CSP's/MSP's that are not experienced with the process.

When considering a consolidation, it is important to know what you may be up against, and experience

really is everything. Whether it be homegrown applications, duplicated files, or shared mailboxes, each migration should be treated as its own unique project. Having the experience to identify what areas will need to be rebuilt, and which are able to move will save a business time, money, and a lot of headaches down the road.

Instead of attempting to migrate something that cannot be moved and spending several hours on a task that is destined to fail, at Finchloom, our experts have the

experience and expertise to be able to identify exactly what can be moved and what cannot, long before the migration begins. Instead of trying (and failing) to migrate something that cannot be migrated, our experienced team is able to identify the inability to migrate ahead of time, which ultimately provides savings on the cost of the project.

"Having the experience to identify what areas will need to be rebuilt, and which are able to move will save a business time, money, and a lot of headaches down the road."

## Tip #7

# Engage a Trusted Partner to Bridge your Teams Skill Gaps



For most businesses, tenant migrations are a rare occurrence, and for some reading this, it may be the first time that you are considering making the move. Alternatively, there are some businesses who go through regular mergers and acquisitions and have the need to consolidate their technology platforms often. Some companies have a new consolidation nearly every week, as they are constantly acquiring new companies in their sector. Finchloom has worked with clients in both types of situations. So, the question is, why spend time and money to train your

team to do a one-off project or have staff on hand with a skill set that is not going to be used often? Instead of having to hire an entire IT team to complete these recurring tasks (which come with an increase in payroll, benefits, etc.), many choose to engage a partner like Finchloom to augment their team quickly and easily with highly experienced experts to handle the project.

Finchloom not only offers specialized expertise to support your migration or consolidation project, but we will train your

IT employees to support your newly consolidated environment, understand how to deal with bug fixes, updates, etc. We train all teams before, during, and after migration, so that once the project is complete, your business understands exactly what they need to do to manage the new environment. As a trusted partner to our clients, our goal is to enable them to be self-sufficient and ensure they are not reliant on a vendor for anything once the migration or consolidation is complete.

An important thing to consider in this type of project is the increase in complexity when there is a need to consolidate several tenants into one master tenant vs. needing a single tenant-to-tenant migration. And learning the ins-and-outs of this process is a daunting task.

If someone has executed a single, tenant-to-tenant migration, they will have some understanding of how the consolidation of multiple tenants into a master tenant works, but due to the increased complexity of consolidating multiple environments, they will still be lacking a great deal of the necessary knowledge and expertise. And this complexity increases when you are migrating from systems outside of Microsoft 365, whether it be moving out of Google Workspace, a disparate system, or any of the other options that exist out there.

There is just no way around it, experience is the best form of training when it comes to consolidation, so if your company does not have access to an expert resource that has done this before, chances are that employing someone who is trying to learn how to execute this type of project via online videos and blogs won't cut it. Each migration/consolidation is completely unique and having extensive on-the-job experience with the vast number of different approaches and methods used in these complex migration and consolidation projects is key to success.

While the upfront cost of a consolidation may initially be higher than keeping systems separate, it is also important to consider the long-term impact. As we addressed in the beginning of this eBook, keeping systems separate can cause a large amount of extra and/or duplicated work

and duplication of resources needed to manage these separate systems, but even further, it can cause extreme frustration for the employees using the systems. So, while the up-front cost of a consolidation may be higher than leaving the systems separate, it can be easily made up for with the decrease in operational costs and increase in productivity, collaboration, and ease of use of the newly consolidated system.

FROM THE  
**START** OF THE

PROJECT, WE'RE  
THINKING ABOUT

YOUR **END-USER**

# #2 Chapter 2:

## Key Considerations & Mistakes to Avoid



Downtime can be incredibly damaging to businesses today, and with employees effectively working from anywhere, and many times on different schedules, it is necessary to minimize downtime so that your business can function effectively and efficiently. With unplanned downtime, organizations lose customers, employees become frustrated, and overall, the business becomes less efficient, trustworthy, and profitable. Downtime can be caused by several factors when it comes to

tenant migration/consolidation; here are some of the major mistakes that mergers and acquisitions generally make when approaching tenant migrations that can cause downtime and other business hindering issues.

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## Key Considerations

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## **Not taking time to have a conclusive initial discovery and planning phase**

As we touched on briefly in Tip #1, bringing in as many different stakeholders in the beginning of a consolidation is essential. We migrate Office 365 content all the time, however, that is not where the complexity lies. Mail and files can generally be migrated easily and within a couple of hours to a couple of days (depending on the size of the migration). Complexity rears its head when the tenant that is being migrated contains business built homegrown applications. Moving a workflow from an old environment (potentially on a different

platform like Google Workspace) may be more challenging than initially thought because the new master tenant may not operate in the same manner. Identifying the systems and programs that will need to be rebuilt is a large part of the initial discovery phase and can justify how many hours the consolidation will take. It is critical to understand what and where these integration points are so that the customers' ability to do business is not inhibited after the cutover dates and when the migration begins.

## **Setting unrealistic timelines**

When deadlines are set and then come and go, this can be demoralizing for any organization regardless of size. In addition to the loss of productivity that can come with missing deadlines, it can also harm the reputation of a new owner if business critical functions are not completed or operational on time. Setting realistic timelines and ensuring that the necessary planning is complete can make a consolidation or merger that much smoother.

## **Not properly identifying upfront all legacy system(s) that are being migrated**

There are innate differences between migrations from the beginning. The steps necessary to complete a migration from on-prem environments are vastly different from those taken when migrating from a different cloud system like Google Workspace. Identifying all systems and subsystems that are part of the migration is vastly important, and before migrating any complexities that lie within the existing systems should be identified.

FROM  
**SMART**  
**IDEAS**

TO **SUPERIOR**  
**EXECUTION**

WE'RE WORKING  
WITH YOU EVERY  
STEP OF THE WAY

## Key Considerations

Consolidation does not have to mean losing domains or fully merging into a single company. From the user perspective, nothing needs to change. Employees can keep their emails as separate domains or receive access to different areas while all falling under the umbrella of a single master tenant.

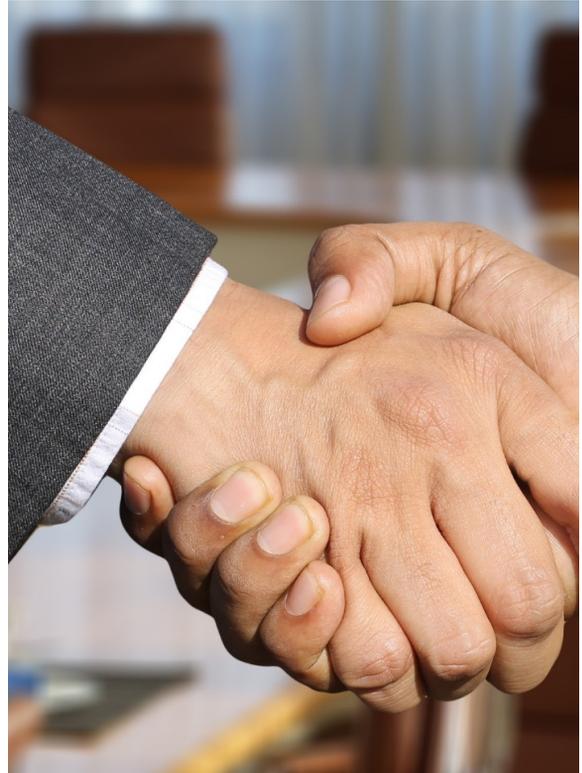
Businesses can also create or keep and maintain separate identities within O365. All users can have their own company domain, Teams and SharePoint sites for their company, can keep their mail separate, and more. There are many ways to maintain that virtual separation between the newly singular tenant via invisible firewalls.

The combination of multiple tenants and creation of invisible firewalls allows companies to stay separate and more effectively utilize the collaboration tools that are commonplace in today's work from anywhere space. Allowing employees from recently acquired companies to collaborate with employees of the purchasing company as soon as possible enables the organization to 'become one' much more quickly as now everyone can communicate and collaborate seamlessly regardless of the business they are coming from.

Compliance and regulatory issues are another principal factor in tenant migration. If a retail company purchases a company in a more regulated industry, like finance for example, and wants to consolidate their tenants, compliance issues are a top priority. If proper discovery work is not done on this upfront, a tenant consolidation could wipe pre-existing regulatory standards in the finance tenant, which would then have to be rebuilt. Instead of rushing into things, we recommend that the acquiring business take the precautions and conducts the necessary initial discovery to make sure that at the end of the consolidation, both businesses are up to the standards set forth for their respective industries.

The Business Impact

# Chapter 3



**Ease of Collaboration:** Within a single tenant, users can collaborate more effectively throughout the entire (now singular) company. Products like OneDrive, Teams, and SharePoint offer sharing and collaboration securely and with ease across the single tenant. No more management of multiple accounts per user, or creation of guest accounts/access.

**Streamlined and Automated Processes:** In a single tenant, automations can be created and/or implemented using automation tools like PowerApps.

Optimization of business processes and standardization of recurring tasks help businesses drive innovation and forget about the tedious recurring tasks.

**Cost Savings:** As outlined in this eBook, operating two (or more) separate environments means a massive increase in administrative overhead and overall operational cost. Because maintaining two or more environments is much more complex and the investment in resources is much higher, investing upfront in consolidating into a master tenant just makes business sense.



Collaboration



Automation



Cost Savings



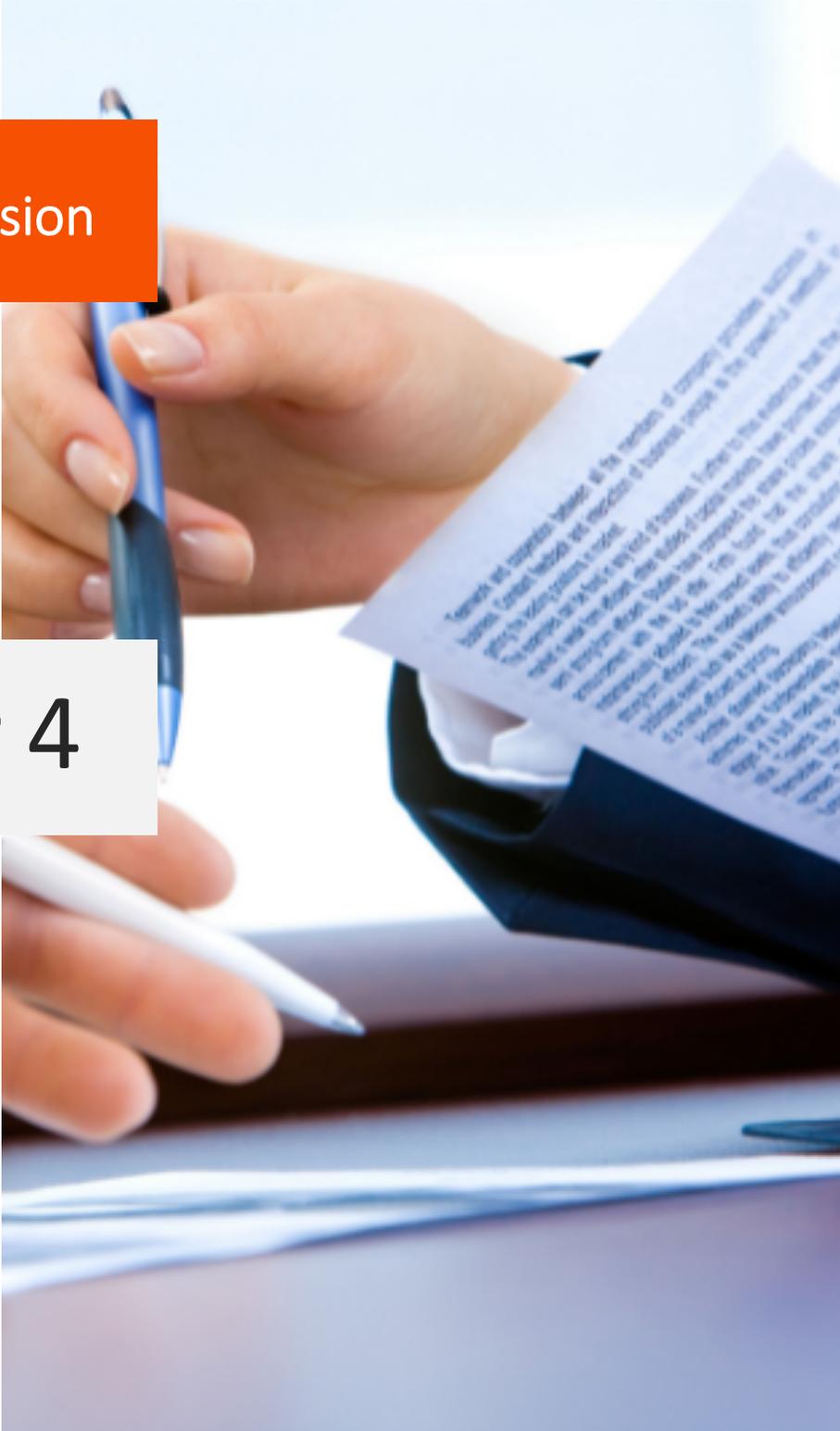


## Business Impact: Client Example

### Business Impact – Client Example

Business 1 is an IP protection and solutions firm that supports thousands of companies in protecting their brands. Finchloom’s initial analysis focused on building a master environment that facilitated easily adding acquired organizations and divesting when necessary. By understanding the business and requirements before and throughout migration, we were able to define an environment and

methodology for future mergers and acquisitions that saves Business 1 time and money immediately, and with each future migration/consolidation. Within future migrations, Business 1 will be able to more easily add organizations to its new tenant. On the same hand, Business 1’s tenant was set up so that if at some point they need to divest, they are able to do so more simply as well.

A close-up photograph of a person's hands in a dark business suit. The right hand holds a blue pen, and the left hand holds a white pen. They are positioned over a document with some legible text. The background is a bright, out-of-focus light blue.

Conclusion

#4

Chapter 4



Completing a tenant-to-tenant migration or multi-tenant consolidation is an extremely complex process and should only be handled by highly experienced professionals.

Finchloom has the experts to help your business make the move easily, and the experience that comes with years in this practice.

In the 8 years that we have offered our tenant consolidation service, we have completed hundreds of projects totaling thousands of hours executing consolidations and migrations specifically. Whether you are looking to get out of Google, or you just purchased a business with a pre-existing Office 365 tenant, chances are we have worked on a similar project recently.

## **Our Process:**

### **Discovery & Assessment**

To ensure that we successfully migrate or consolidate for our clients, we always start with initial discovery and assessment planning. Figuring out what needs to move, what needs to be rebuilt, and what we do not need to touch is an aspect that a lot of companies miss their first time migrating or consolidating.

### **Pre-migration Planning & Staging**

After initial discovery and assessment, we then move into the pre-migration planning and staging. In this stage, we have already determined the systems that are being moved and we then assign Finchloom resources to the process. Typically, we will always need mail and collaboration specialists, but in some cases, we will also need to bring in experts on identity or security depending on what is being moved or rebuilt. In this phase, we bring in project managers to start assigning resources and making sure that the process is run as smoothly as possible. Queueing up data is also crucial in this stage, so that there are only incremental changes as the migration begins. Investing in planning and staging so that we are ready for the cutover ends up making the process much faster, saves money, and mitigates downtime. At this point in the project, we are typically able to provide an estimate of the number of hours required and the project completion date.

### **Migration Execution**

Once we are fully prepped and ready to migrate, we move into migration execution. This is where all the initial groundwork pays off. A migration can take as little as a couple of hours or up to hundreds, depending on the size and complexity. We work with our clients' teams to not only ensure that everything is going as planned, but also to mitigate downtime by cutting over new systems when it will not impact productivity. We have full transparency in this stage as our clients will be the ones maintaining the newly consolidated tenant, so seeing how the process works allows our clients' IT teams to peak behind the curtain and see how some of these new systems work.



## Support & Closeout

### **Post Migration Support**

The last step before project closeout is post migration support. In this stage, the consolidation/migration has been completed and Finchloom makes sure that everything is working correctly and as expected. If there are any bugs or issues, we take care of them in this phase so that we leave our clients with a fully operational master tenant.

### **Project Closeout**

Finally, we move into project closeout and feedback. Finchloom will host a meeting with all key players involved in the project

including but not limited to the Account Manager, Project Manager, Technical Leads, and anyone who would like to be present from the client organization. On this call, we will review how the project went, where Finchloom did well, and where we can improve. It is through these project close meetings that we can learn about how to better serve our clients moving forward. This is also the step where we urge our clients to participate in Finchloom's Magic Program and see if there are any other projects that Finchloom can help with to make the transition as smooth as possible.

For any business who is planning on merging and/or acquiring, has done so recently, or still operates utilizing multiple tenants, it is critical to get in touch with Finchloom to sure up your business systems and make the most out of your IT spend. We offer a free consultation to see if your business is operating efficiently and will tell you in what areas we can help you improve. A 30-minute consultation can save your business not only money, but can improve employee satisfaction, collaboration, and decrease churn within your organization.

WE COMBINE  
OUR **MICROSOFT**  
**KNOWLEDGE**

WITH UNIQUE  
**HUMAN INGENUITY**

TO SOLVE  
**TECHNOLOGY**  
**PROBLEMS**



Need Assistance with Tenant Migration or Consolidation?

[CLICK HERE TO CONTACT FINCHLOOM](#)

