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The Sourcing Group: Moving a 200-strong organization from on-premises Exchange to Microsoft 365

Founded in 2005, The Sourcing Group provides its customers with an efficient one-stop shop for branded materials, from uniforms and apparel to marketing collateral, and direct mail to promotional items. The company's focus on innovative technology and industry expertise enables it to provide unparalleled service, which has been a key driver in its growth over the past few years.

This growth has seen The Sourcing Group expand from just four offices with 40-50 staff in 2014, to more than 20 offices across North America employing in excess of 200 people today. With the bulk of this growth occurring through targeted acquisitions over the past three to four years, the company has seen a parallel growth in its IT infrastructure.

The challenge of supporting IT infrastructure growth

Until recently, the company was committed to self-hosting with a core focus on high availability. This meant considerable investment in hardware resources. However, as more companies were added to The Sourcing Group family, it became increasingly clear that this model was going to be hard to sustain.

"We realized that our reliance on on-premises infrastructure was becoming a major constraint. As the company expanded, we were running out of resources far more quickly than expected, with email being the biggest culprit," explains Jerry Edwards, CTO of The Sourcing Group, who worked in tandem with Ray Martinet, Director of Technology at The Sourcing Group. "On top of this, a by-product of our growth was that we had acquired different businesses with different IT infrastructures. A lot of these companies were already using Microsoft 365 (or Office 365 as it was called

then), and this meant we found ourselves operating in a hybrid environment. Ultimately, we were facing a key decision: either spend a lot of money to build out our existing architecture to support our expanded environment or look at moving to the cloud."

With their existing hardware still having more than two years left in it, this wasn't necessarily a straight-forward decision. There were also other challenges in a move to the cloud, most notably around licensing. Their existing volume and standalone licensing pricing packages were based around on-premises arrangements. Initially, they didn't feel they could just trash everything and start again.

Whatever the eventual outcome, it was clear something had to be done. So, last fall, the company undertook a major overhaul of its infrastructure. "We went through a drastic clean-up effort to reduce our space requirements, particularly in Exchange," says Edwards. "While doing this we realized that continuing as we were was simply unsustainable. We either needed to centralize everything in Microsoft 365, and absorb the cost of buying new cloud-based licenses or incur substantial infrastructure costs."

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There was also another key concern for Edwards and his team: security. "The reason we eventually decided to take the plunge with Microsoft 365 was not just cost," he explains. "We aren't experts in securing these sorts of environments, but Microsoft is."

Managing the migration to Microsoft 365

Migrating a company of this size to the cloud was not a process the company wanted to manage or indeed felt it had the expertise to handle in-house, so Edwards knew he needed to look for an external partner with experience of migrating large organizations to the cloud. This is where Logically stepped in.

"With the migration covering 12 domains, seven companies including The Sourcing Group itself, and over 2TB of Exchange data, this represented a fairly substantial migration," explains Scott Hanshaw, Account Manager at Logically. "The planning process alone took around a month, with an additional week of preparation. The actual migration itself took about a week, with another week to close out tenants and mitigate one-off issues. We also needed to support users of all technical levels and abilities, across 20 locations, including those working remotely or from home and move users from legacy domain into The Sourcing Group."

With a proven track record in migrating companies to the cloud, Logically was able to manage The Sourcing Group through a smooth transition to its new system with few, if any, issues. "The Active Directory sync went flawlessly, which was helped by the fact that Jerry and his team had done a lot of the necessary clean-up beforehand, eliminating dormant accounts," says Hanshaw. "And our main training focus centered on getting staff up to speed with new apps, like Teams, and how they can be integrated into the business."

As part of the migration, Logically was also able to create a standard onboarding process for new acquisitions, so there was now a very clearly defined strategy for new companies joining the group.

Benefits

The most obvious benefit of The Sourcing Group's move to the cloud was on the company's bottom line. To support their existing on-premises model at the new level, they would have been looking at abandoning their current hardware and investing in the region of $200,000-250,000 in new tech. The cost of having Logically run the migration project was only a fraction of the cost of a hardware refresh, and with most acquired companies already having E3 licensing within Microsoft 365, the combined cost was far less than purchasing the new on-premises hardware and adding companies to an on-premises Exchange system.

On top of this, The Sourcing Group had used 2.5 TB in their on-premises Exchange. With the entire email set up now in Microsoft 365, they benefitted from lowered cost of maintaining their email infrastructure.

There were also a number of key soft benefits to the move. Most critically, pushing everything to the cloud meant the weight of worrying about the platform was removed from The Sourcing Group —no more hardware refreshes, no more support issues, and no more patching of critical systems, such as Active Directory. Added to this, Microsoft 365 brought major benefits in terms of security and guarantees around availability. Plus, The Sourcing Group now had much greater control over their licensing, with Logically helping to centralize all Microsoft 365 tenants and licensing.

Knowing that the company's backend systems were under control and being managed effectively meant Edwards and his team could focus on customer-facing tech. "If I don't need to worry about internal tech, it's a huge burden off my shoulder," he says. "Email is still a primary tool for our operations, any kind of outage directly translates to revenue loss. Not having to deal with that is a godsend."

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