



# Commercial Property Services Firm Migrates Documents to Office 365 – SharePoint Online

**Optimum migrates company documents from 3<sup>rd</sup> party cloud repositories to SharePoint Online, with proper metadata and security permissions.**

**Organization**

Valbridge Property Advisors

**Website**

[www.valbridge.com](http://www.valbridge.com)

**Industry**

Property Services

**Country**

United States

**Challenges**

Client’s documents and files were stored in 3<sup>rd</sup> party cloud environments without having a user-friendly interface, robust document management capabilities, and proper content searchability. This resulted in collaboration issues and company content not being easily accessible or shareable by employees.

**Optimum’s Involvement**

After conducting an initial assessment of client’s content and documents, Optimum designed a SharePoint-based document management and Intranet solution and migrated the documents over from the 3<sup>rd</sup> party clouds into SharePoint Online, enabling better collaboration and document management capabilities as well as content sharing across groups and teams.

**Deliverables/Outcomes**

Successful migration of company’s documents to Office 365 SharePoint, provided a more robust collaboration platform for users and enabled a better document management and sharing mechanism while ensuring proper security and content ownership, all resulting in increased efficiency and productivity of the employees.

## About Valbridge Property Advisors

Valbridge Property Advisors is the largest independent commercial property valuation and advisory services firms in the U.S., with 200 MAI-designated appraisers, 78 office locations, and more than 675 staff across the nation. Valbridge provides independent appraisal services consistent with the highest industry standards of practice. Each Valbridge office is led by an appraiser who holds the MAI designation of the Appraisal Institute.

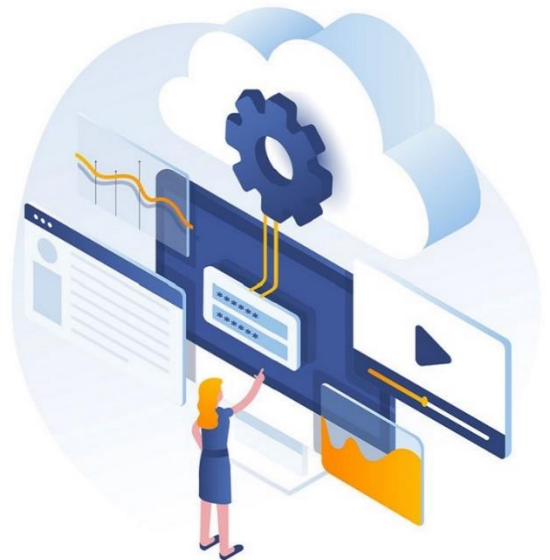
## Project Background

Valbridge Property Advisors engaged Optimum to assess and migrate the existing company's documents and files, located on 3<sup>rd</sup> party Clouds, into SharePoint Online, ensuring proper user access and security as well as metadata and tags for each document groups are in place. This helps maximize the company's investment in Office 365 and reduces their cost with the 3<sup>rd</sup> party cloud platform.

## Optimum's Involvement

Working with the client's office locations and IT group, our team of certified Office 365 and SharePoint developers assessed the current 3<sup>rd</sup> party cloud environments and the existing documents and files store in various locations. We then helped the client with the classification and tagging of the documents to be migrated and established the SharePoint taxonomy and metadata structure. Our team then developed the back-end document management and security structure in SharePoint Online and designed an Intranet page, using SharePoint's Modern Sites, to provide a centralized interface to business users.

After the development of the site structure and the Intranet pages, Optimum migrated the content and documents from the 3<sup>rd</sup> party cloud to SharePoint Online, utilizing Sharegate Desktop, ensuring proper metadata and searchability of the documents and enabling a smooth transition to the new environment. Our team also conducted user training to ensure the maximized adoption of the new environment.



## Project Outcome

Successful migration of company's documents and files to SharePoint Online, with the proper metadata and user access levels, provided a more user-friendly and robust collaboration platform for the client's users and enabled a better document management and sharing mechanism while ensuring proper security and content ownership, all resulting in increased efficiency and productivity of the teams and company's employees.

## About Optimum

Optimum is a modern Software Consulting firm, designing and building results-driven, customized solutions that brings the power of SharePoint and Office 365, Digital Workplace Portals (Intranet and Extranet), Business



Intelligence (BI), and Systems Integration to organizations to increase efficiency, reduce operational costs, and drive digital transformation.

Our services are designed to help organizations realize the full impact and ROI of Microsoft solutions investment, while increasing their user adoption and engagement, especially for Office 365 based solutions and apps.

**Contact us to discuss your project needs and goals and see how we can help:**

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