

Financial services organization invests in winning customization

Client Background

This financial services organization is a leading global investment bank with a strong and profitable private client franchise. A leader in Europe, the bank is continuously growing in North America, Asia and other markets. The bank competes to be the leading global provider of financial solutions for demanding clients creating exceptional value for its shareholders and people.

Client's Problem

As the organization began to prepare for a Microsoft Office upgrade they knew they had many files in key areas within their environment that were password protected, contained VBA code or both. Although they were aware these Office upgrade challenges did exist, they were not aware as to the extent in their environment. They had planned a migration of their Office platform across their various offices worldwide and had decided to use Microsoft's Office Migration Planning Manager (OMPM) tool to handle the conversion internally.

"We had high expectations of what OMPM should provide, and were disappointed when this tool under-delivered. We had been depending on the OMPM platform to help with our migration project, but after using it, we quickly realized that it wouldn't meet our needs and we needed another solution," said a senior IT manager from the organization.

Some manual remediation was completed prior to knowing about M3 for Office, however several key files in the trading floor area failed as a result of not being identified correctly by Microsoft's Office Migration Planning Manager. Using M3 for Office enabled the organization to accurately and confidently identify the files with these potential issues in advance and scope their project accordingly.

Client's Solution

The organization's UK team learned about ConverterTechnology from a colleague in their United States office. Upon the colleague's recommendation, the UK team decided to try M3 for Office to resolve their issues and complete their migration project.



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“To be honest, after our disappointing experience with OMPM, we were a bit skeptical about using ConverterTechnology’s tools, as they were unknown and unproven to us,” the senior IT manager explained. “ConverterTechnology offered us a trial period to evaluate the toolkit, and if we were pleased with how it worked, we had the option of buying a full production license,” he continued. “It was a great option for us, and gave us the opportunity to see how it worked before agreeing to a longer-term commitment.”

The organization agreed to a three month ConverterTechnology pilot project and, during that time, ConverterTechnology taught key members of their team how to use M3 for Office. M3 for Office was then shared with various business units to evaluate against their business critical files.

Using the DiscoverIT, the client was able to identify a very large number of Excel files within its environment that carried VBA project-protected passwords, which protected not just the files, but also the VBA code within the files. This discovery, which was previously undetected by OMPM, enabled them to create a policy that either removed these passwords or processed the password-protected files in the correct way.

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After a very thorough pilot program, the client, with ConverterTechnology’s collaboration and technologies, was able to successfully migrate their Office platform. As a result, the organization purchased ConverterTechnology’s full production license, which has been tremendously successful in supporting the organization’s performance and operability.