

CASE STUDY

From Lift-and-Shift to Full Control: A UK Investment Firm's Next-Level Migration



Challenge

Migrating 400,000 documents from Alfresco to SharePoint for a UK-based investment firm.

Solution

A structured migration approach combining metadata analysis, business validation, and technical redesign.

Result

An optimized SharePoint environment with reduced metadata complexity, validated permissions, and improved performance.

When “just move everything” becomes a risk

For global investment firms, enterprise content is not just documentation—it is evidential, regulated, and business-critical. Any migration initiative had to guarantee continuity, control, and defensibility. After all, you’re moving permissions, audit trails, metadata logic, and years of governance decisions.

So when a UK-based investment organization approached us to migrate their Alfresco environment to SharePoint exactly as-is, our team had their doubts about the directive. “IT departments often think a simple lift-and-shift will do, but we find that is rarely the case,” Global Sales Lead Ruud de Wolf explains. “There’s always more beneath the surface than there initially seems to be.”

A controlled redesign based on content discovery

In this case, it was a matter of system compatibility: Alfresco and SharePoint operate under fundamentally different technical constraints. Simply copying existing structures and metadata would not only replicate legacy complexity—it would create entirely new technical issues.

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Ruud de Wolf, Global Sales Lead at Xillio

So instead of replicating the existing structure and migrating all metadata fields, Xillio approached the project as a controlled redesign. The starting point was discovery: understanding how content was structured, how permissions were applied, and where governance assumptions existed without formal validation.

Improved governance in a streamlined content environment

A thorough analysis revealed that many of the existing metadata fields wouldn't need to be included in the migration, Senior Consultant Remco Steelink recalls. "When we delivered the complete set of properties, we immediately noticed that most were system-generated but never used."

This transparency enabled fact-based decision-making: rather than transferring 100 fields into SharePoint, the organization could determine which ones were actually relevant. "In the end, we migrated only about 15 out of roughly 100 fields," Remco says. The result was not just a technical reduction—it was a governance improvement. Their new enterprise content environment was cleaner, more manageable, and aligned with real usage rather than historical accumulation.

Navigating SharePoint's permission limits

Permissions posed an equally critical challenge. The original requirement was to replicate every permission exactly as it existed in Alfresco. However, a lift-and-shift migration would have exceeded SharePoint limits on how often unique permissions can be modified within a single library.

Instead, the Xillio team analyzed the extracted permission model. Instead of rewriting permissions on every object, the team focused solely on objects that would need to change. By leveraging inheritance wherever possible, the team preserved

access control while staying within SharePoint's constraints.

Content complexity isn't about volume

The real risk here was not scale, but dependency. The migration covered approximately eight folder structures and around 400,000 documents—not extreme in volume, but significant in structural and governance complexity. Legacy systems often contain undocumented workflows, integrations, or structural logic that only surfaces late in execution.

"A lift-and-shift project enables short-term speed," Ruud summarizes. "A structured migration is about long-term control." And in a regulated environment, that difference is critical.

System limits, metadata inconsistencies, and permission logic only become visible when analyzed deeply. By addressing these dependencies early through structured analysis and transformation logic, the Xillio team minimized surprises during execution. The migration became predictable—not because it was simple, but because complexity had been deliberately managed.

Content migration as a foundation for future growth

By treating migration as a governance-first transformation rather than a technical relocation, the organization reduced compliance exposure and strengthened operational resilience. "End users are very happy with the new SharePoint environment, because it performs much faster than Alfresco used to," Remco points out.

Beyond performance gains, the organization achieved something more strategic: a streamlined content landscape that supports transparency, audit readiness, and long-term scalability—without compromising on daily operations.



About Xillio

At Xillio, we don't just move content. We analyze, validate, and optimize—so your new environment strengthens governance instead of inheriting yesterday's complexity.

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