From Legacy to Modern:

SharePoint Migration Case Studies and Best Practices

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Executive Summary

Organizations worldwide are transforming their collaboration and content management capabilities by migrating from legacy SharePoint environments to modern cloud-based platforms.

This collection of case studies showcases how enterprises across industries have successfully navigated complex migrations, moving terabytes of business-critical content while maintaining operational continuity and enhancing user productivity.

The migrations profiled here span diverse organizational contexts—from multinational corporations managing distributed teams to enterprises consolidating multiple SharePoint instances following mergers and acquisitions. Organizations have achieved substantial benefits including 50-70% reductions in infrastructure maintenance costs, improved document collaboration and version control, enhanced mobile access for remote workforces, and accelerated information discovery through modern search capabilities.

Common success patterns emerge across these implementations: thorough content audits and cleanup prior to migration, stakeholder engagement and change management programs, phased rollout strategies that minimize business disruption, and comprehensive governance frameworks for the new environment.

These cases demonstrate that SharePoint migration is not simply a technical lift-and-shift exercise but an opportunity to reimagine information architecture, eliminate content sprawl, and establish modern collaboration practices that drive business value and employee satisfaction.

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CASE STUDY

BUILD AMERICA MUTUAL

Easier records management thanks to document sets in SharePoint

Challenge

Migrating enterprise content dispersed across 41,000 Alfresco sites to Microsoft SharePoint

Solution

Designing a new SharePoint environment and implementing records management via Microsoft Purview

Result

Successful content migration and integration, for easier records management within the Microsoft suit

Migrating to Microsoft SharePoint to meet evolving content management need

For many years, Build America Mutual relied on Alfresco as their primary enterprise content management system. Although they were in the middle of a conversion to cloud-based Alfresco, they decided to look at potential alternatives.

Measuring at almost 2TB, the overall volume of enterprise content to be migrated wasn't overwhelming per se. However, it was dispersed across numerous sites within Alfresco, presenting a complex scenario for both content migration and records management. This experience underscored the need for a more flexible and integrated solution to meet the customer's evolving enterprise content management needs.

Devising a strategy for simplified business processes

In addition to their content migration request, Build America Mutual also asked us to help them simplify their records management. In order to do both, we needed to design a user-friendly SharePoint environment that would support both the insurance company's operational and internal business processes. Any enterprise content relating to insurance was

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spread across approximately 41,000 Alfresco sites. However, the customer had also set up 116 additional sites in Alfresco, used to store internal documents. After analyzing the enterprise content and the folder structure in Alfresco, the project team settled on a strategy that would migrate content from each Alfresco single-risk site to a new document set in SharePoint. Any redundant content was excluded from the migration entirely.

● Rewriting Alfresco links in SharePoint

Another complicated project element involved approximately 200 links between the different Alfresco sites. Rather than simply redirecting them to SharePoint using the Xillio Redirection Service, our Xillio experts were asked to rewrite the links entirely. This approach allowed us to clean up and optimize the links.

Our team was able to consolidate the many sites, creating an easily accessible content structure in SharePoint. And with each document set now containing optimized metadata automatically linking to its underlying documents, record management and document retention are much more efficient. David McIntyre: "This is a perfect solution for us."

● Technical expertise across the project team

Build America Mutual's Finance and HR departments used separate sites with restricted access folders for each of their nearly 100 employees. From a business case perspective, it was deemed more beneficial to migrate this content without individual user permissions, rather than write separate optimizing automations for each folder. Fortunately, the Build America Mutual team already had the in-house technical expertise to manually configure the user permissions in the new SharePoint environment.

The Xillio team also provided a full SharePoint implementation. This also involved training users on how to navigate the new environment themselves, rather than rely on external consultants to make changes. David McIntyre: "The Xillio team provided exactly the user support we needed." The in-depth approach ensured Build America Mutual employees could leverage SharePoint with minimal support from Xillio.

● Smooth sailing

Although the migration project took longer than average, the extended timeline fostered a positive working relationship and allowed for thorough discussions on implementation strategies. Throughout the project, we met with the customer multiple times and adapted our migration strategy to address emerging challenges, ultimately staying within the estimated timeline. David McIntyre was impressed with the team's dedication: "The time difference was never an issue for Xillio; they always accommodated us." This collaborative effort across time zones highlighted the importance of partnership and expertise when navigating complex content migration projects.

CASE STUDY

STREAMLINING A GLOBAL PROFESSIONAL SERVICES LEADER'S MIGRATION TO SHAREPOINT ONLINE

Challenges

Migrating 200+ TB of content across 6 countries from Documentum into SharePoint Online.

Solution

Content analysis, optimization and migration, disaster recovery, content provisioning, content care.

Result

One strategic DMS, holding all Client data according to consistent global standards.

A Visionary Transition: From Legacy Systems to the Cloud

A global leader in professional services, faced a daunting challenge: they needed to transition over 200 TB of content from a live Documentum system to SharePoint Online across six strategic countries—the US, UK, Australia, Belgium, Germany, and Italy.

The Documentum migration was part of a wider program to transform operations in 46 countries by delivering Document Management capabilities via SharePoint. All this while thousands of colleagues still actively used the existing legacy system, supporting many critical business processes and integrating with multiple applications

Xillio's Strategic Partnership: Analyzing and Overcoming Challenges

Our role at Xillio was pivotal. We meticulously analyzed existing systems and migrated massive volumes of content across diverse site types—some actively used, and others kept as read-only archives. Our approach was tailored to meet specific regional and technical requirements, addressing the significant migration challenges while aligning the new systems with the client's operational needs and strict compliance standards.

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Proof of Concept: Pioneering the US Migration

The challenge began with developing a Proof of Concept (PoC) based on US corporate client sites, which defined the strategy for the other countries. However, during the initial migration of US content, extensive post-migration checks uncovered significant limitations in the old Documentum setup. Using the Xillio platform, we implemented a series of necessary improvements to the client's content, including integration, security, and compliance fixes that significantly enhanced overall content management and quality.

A critical added service we provided specifically for the US migration was disaster recovery as the client needed to leverage the SharePoint solution for DR for a short period of time. By implementing daily delta migrations we were able to meet this need, minimizing disruptions to the client's operational capabilities—a crucial aspect, given the daily use of the DMS. This added layer of complexity required innovative solutions to ensure continuity and resilience during the transition.

Expanding Scope and Rising to the Challenge

The project scope quickly expanded as the Client decided to extend Xillio's work, moving it away from another vendor. This additional scope necessitated parallel migrations to additional countries, each adding layers of complexity. We had to continuously reassess our resources and strategies to maintain momentum and ensure the quality of the migration. Despite the need to significantly extend our timeline, the Client trusted Xillio's capability to adapt and effectively manage these large-scale migrations under ever-evolving conditions.

Adapting to Evolving Conditions: Flexibility in Design

Another significant challenge revolved around the timing of Xillio's engagement. The client's IT Director explains, "Xillio got involved near the end of the overall program, when the target platform was already live and in use by more than 20 countries." This situation required us to develop flexible mapping and provisioning strategies to integrate seamlessly into a predefined target environment.

Remote Collaboration: Building a Successful Partnership

Managing a three-year, remote-only collaboration across several time zones on an international project of this scale was an immense challenge. The project team's diverse composition brought cultural differences in communication style and expectations to the forefront but collaboration and partnership with the Client team was the key to our success. Over time, the working relationship deepened, fostering a strong mutual trust that was instrumental in overcoming challenges.

The Client was particularly impressed by the Xillio team's dedication. "You absolutely cannot fault their commitment to getting the job done," she remarks, "even if that meant working after hours or sacrificing weekends and holidays." That dedication was pivotal in accommodating the evolving project scope and ensuring timely delivery.

Triumph of Modernization: Performance and Productivity Gains

The Client's modern document management system has now been implemented for customer data across 46 countries, which has proved to be tremendously valuable, the IT Director says. "With over 30 different global applications now integrated with our DMS, each with unique needs, content accessibility has improved significantly for our colleagues. Feedback from the Business has highlighted an improvement in performance and productivity gains, affirming the project's success..

CASE STUDY

Asian Electricity Company Migrates Content to the Cloud in Phases Based on Xillio's Best Practices

Challenge

Enterprise-wide content migration from FileNet and file shares to Microsoft SharePoint Online

Solution

Analysis, database connector development, content mapping and testing, including migration and setup standard approach for future migration projects

Benefits

The phased content migration from FileNet to Microsoft SharePoint Online for the IT and HR departments now defines best practices for a reliable and efficient cloud transition for the entire company

A major electricity company in Asia Pacific operates in Hong Kong, China, Australia, India, Southeast Asia and Taiwan, offering a complete range of energy solutions. Its business operations vary from the renewable generation, trading and transmission of electricity to its distribution. The company's aim is to build a sustainable business that is future-ready. They have developed a cloud strategy for the optimal achievement of those ambitions. This includes the phased migration of all corporate content from Enterprise Content Management system (ECM) FileNet and network drives to Microsoft SharePoint Online.

● Transitioning to cloud

Managed by consulting firm Protiviti, the cloud transition is a multi-year project. Antonio Maio, Protiviti's Managing Director, explains: "The content migration to Microsoft SharePoint Online is a crucial part of the transition to Office 365 and Azure. To leverage the benefits of this new environment, the content from all departments must be migrated to Microsoft SharePoint Online completely, deduplicated and in accordance with the applicable laws and regulations. All of this, of course, without data loss and with minimal impact on daily business activities. We lack the specialized knowledge of content migrations from FileNet to SharePoint Online. That's why we called in the experts.

Our partner Xillio has the knowledge, architecture and tooling that are required for a successful

migration of all content. Moreover, they have developed a standard that we can eventually use to conduct content migrations for the electricity company independently."

Cleaning up and deduplication

Due to the size of the company, it consulted Xillio and decided on a phased migration. First, the IT department's content was migrated with the aid of Xillio's detailed roadmap. In the initial situation, the documents in the departments were spread across FileNet and file shares, 216 GB and 1766 GB of data, respectively. Using the analytics tool Xillio Insights, all the documents and files in the ECM and on the network drives were inventoried and analysed. The content was then cleaned and deduplicated on the basis of that knowledge, preventing duplicate content from being migrated to the new environment as this can complicate searches, cause errors and consume unnecessary storage capacity.

Migration speed increased tenfold

Using the results from Xillio Insights, they could now decide on the mapping and structure and draw up the business rules for the migration process. During the pilot for the first migrations, the speed of the FileNet API fell short of expectations. Sjoerd Alkema, Head of Global Sales at Xillio, says: "For customers, it is important that a migration does not impact the productivity of end users. To safeguard continuity, data must be transferred quickly and correctly, so it is available again as soon as possible. Accordingly, our engineers developed a database connector that increased the speed tenfold, which indeed improved the speed of migration at this energy company."

No downtime

To begin with, an alpha migration was conducted for the IT department to facilitate the progress of the process. After tests and validations, the delta migration included only the altered documents. This incremental approach ensured that all content and metadata entered the new environment correctly, all without downtime and other disruptions to end users. During the process, they discovered that the content also contained links to an external application. For this reason Xillio developed a Link Re-director to migrate those links correctly as well. Thanks to that strategy, the links still work in files that end users consult and all linked information is simply available in Microsoft SharePoint Online.

Best practices and training

Following the successful migration of the IT department and working closely with Protiviti Canada and Hong Kong, Xillio migrated the HR department too. This second department involved 134 GB in FileNet and 1 TB on network drives. Here, Xillio followed the same approach as for the IT department. Based on the migration of the first two departments, Xillio then defined best practices for the other departments. As Protiviti will be performing these migrations, their employees have been trained in the optimal use of the Xillio tooling. Now that they can easily capture and analyse the right information, Protiviti can perform the other migrations autonomously. However, Xillio's experts are always available as backup and if there are questions, Xillio can, for example, provide specific advice based on an analysis of logging data.

Foundations for the future

Employees from Protiviti Canada and Hong Kong and Xillio also worked on this international project, with Protiviti Canada monitoring the connection with the cloud transition while the Hong Kong office maintained the contacts with the electricity company. This indirect communication created challenges at times, but thanks to Xillio's experts' thorough understanding of the migration process, it did not cause any delays. The first two migrations were on schedule and now provide the foundations for the future migrations of about 7 TB in total, allowing the company's employees to store and access relevant content quickly and efficiently, even in the cloud.

CASE STUDY

International Exchange Company Migrates Unstructured Content from FileNet to Microsoft SharePoint Online

Challenge

Migrate diverse content from a scanning application from FileNet to Microsoft SharePoint Online

Solution

Content analysis and the structuring, mapping and testing of content, including migration and advice on the best setup for the target system and retention

Result

Content analysis and migration from FileNet to Microsoft SharePoint Online provides end users with a clear document structure, secures data from a scanning application and makes that data easily accessible across the global organization
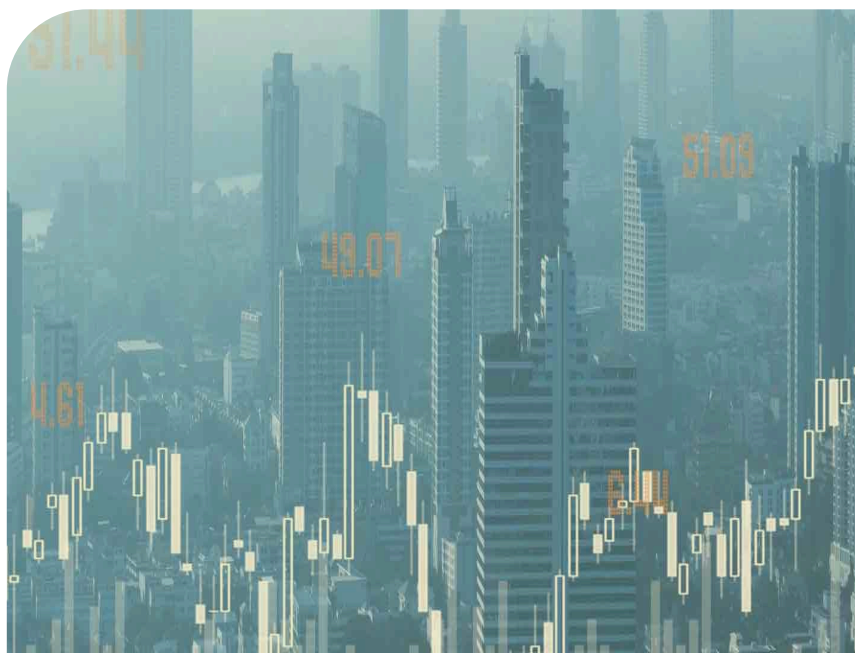
An exchange company that is headquartered in the US and and operates all over the world, offers a variety of investment options for its global clients. The company is driven by continuously providing innovative solutions to help its clients to stay ahead in the financial market. In order to ensure that data within the organization is stored in compliance with legislation and regulations, and to make this data easily accessible, signed documents have been transferred from a dedicated FileNet scanning application to Microsoft SharePoint.

The scanning application was used specifically to digitize and store signed documents, which were then automatically stored in FileNet. However, this was done without a clear structure; the scanning software did not provide consistent metadata or file names, which made it difficult to locate and access this often confidential data. Additionally, the lack of overview hampered the organization's ability to demonstrate compliance with prevailing laws and regulations. The challenge here was to secure and migrate the content - over 400,000 documents – in a reliable and efficient manner. To do this, the company turned to the experts at Xillio

● Mapping the content

The first step was to identify the content. Corné van Leuveren, co-founder of Xillio, explains: "This was a labour-intensive process, as it sometimes required looking at certain files at document level. Once we had conducted a detailed analysis using

"Once we had conducted a detailed analysis using our tool Xillio Insights, we mapped the content and identified all the content types. "

Corné van Leuveren, Co-founder at Xillio

our tool Xillio Insights, we mapped the content and identified all the content types. This included, for example, invoices, identity documents and contracts. This inventory also included dating. The analysis showed that there was a lot of variation, and in many cases, metadata was missing. Hardly conducive to transparency."

● No lift & shift

To enhance content control, the content structure was defined in close consultation with the client's IT department; this also included mapping and business rules for content migration. At the start of the project, no decision had yet been made about the target content system. The global organization uses both Salesforce and Microsoft SharePoint Online. Given the nature of the content and the access requirements, Xillio recommended a migration to SharePoint Online. Xillio has extensive experience in migrating from FileNet to SharePoint and was able to help the company set up the target system. Although this was not a lift and shift project, content was automatically transferred to the new environment by content type. As well as adding additional metadata fields, Xillio also included the relevant retention rules in the setup. It is precisely these additional consulting services that underline Xillio's added value.

● Best practices

After careful preparation and analysis based on Xillio's best practices, the unstructured data was migrated on time and on budget. All content is now easily accessible to the company's employees; thanks to correct metadata and a logical structure, they can now find and access files quickly. And, of course, the new content structure and rules also apply to new digitized documents.

CASE STUDY

Community Preservation Corporation Migrates Loan Documents to Microsoft SharePoint Online with Ease

Challenge

Migrate content from FileNet to Microsoft SharePoint Online

Solution

Extract content, perform tests and migrate to a new intuitive document structure on the Microsoft 365 platform

Result

Controlled content migration from FileNet to Microsoft SharePoint Online gives employees easy and intuitive access to structured loan content with improved usability

The Community Preservation Corporation (CPC) is non-profit organization, with Head Quarters at NYC in USA, that provides financing for affordable housing and community revitalization. It provides a full suite of construction lending, permanent lending and equity investing products. Working alongside government agencies, local community groups, banks, and other lenders, CPC creates customized loan opportunities to stimulate multifamily housing projects. Today, it is the largest CDFI dedicated exclusively to investing in multifamily housing, having invested more than $12 billion to finance the creation and preservation of more than 220,000 units of quality housing in neighborhoods across New York State and beyond.

To support loan processing, all relevant documents were stored in IBM's FileNet with Navigator as the user interface. In 2023, CPC chose to migrate all document content to Microsoft SharePoint Online to leverage its cloud capabilities, improve user experience and enhance search capabilities.

CPC used a legacy application to support the loan process, and related documents were stored in the content management system FileNet. This included documents such as contracts, legal documents relating to finance, conditions, investors, real estate, and asset management in various formats. Employees could access this content via this platform. Following the decommissioning of the legacy application, FileNet was used as a standalone application to upload, store, and access documents.

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Archana Bavaswamy Rao, Assistant Vice President, Director Business Data Architecture and Development at CPC, explains: "The usability and search options within FileNet were limited. There was no clear structure, so it took employees valuable time to find the documents they were looking for. There were also limited options for customizing the system. In addition, our IT team had to devote a relatively large amount of time and resources to managing the system."

Familiar look and feel

To simplify the day-to-day management of content and to improve the user experience, CPC decided to migrate its content to Microsoft SharePoint Online. The organization was already using Microsoft365 and had a SharePoint environment in place. One of the advantages of this move was that employees were already familiar with the look and feel of Microsoft applications. Because they were already using SharePoint, the transition was smooth and user training could focus on customized features for document uploads and searching. In order to safeguard the integrity of the loan related content across the organization, all existing FileNet documents had to be migrated to the new platform.

Content analysis

The project was essentially a 'lift and shift' migration of the documents and metadata. Archana Bavaswamy Rao explains: "We knew that some of the content were 'ghost' content without physical files attached and legacy metadata needed to be applied consistently while moving to SharePoint. Hence we started with our own content analysis to assess the scope of the migration. It wasn't easy to estimate the exact scope because we had few metrics about the environment. CPC's FileNet implementation was OnPrem and not on IBM's Cloud, so there were no IBM provided standard reports, while it was expensive to write custom code to extract data and build metric reports. Hence, a simplified database analysis exercise was performed. From this analysis, it turned out that

we had approximately 1.2 million documents in various formats - PDF, Excel, Word, Outlook, ZIP, and XML. We also identified key metadata that was useful information. This provided quantitative scope and complexity definition for the actual migration."

Business continuity

CPC is a relatively small organization with limited IT resources and no technical expertise of SharePoint. In collaboration with consulting partner EisnerAmper, a reliable third party was selected to carry out the migration. "Xillio had good references and backed them up with a clear approach. Based on our analysis, they offered a realistic roadmap. They also provided useful feedback on planning at an early stage, so we were able to develop an effective project plan with clearly defined phases. This was important to us because we wanted to maintain business continuity. A migration shouldn't impact our business processes."

Migration & Deployment

The migration process was collaborative with EisnerAmper managing the project for CPC, CPC providing clear inputs to Xillio's technical team and Xillio's project manager maintaining transparency on milestones completed or in progress. "Xillio's technical team had a sound Plan B to invoke to action when the initial Plan A for SharePoint had issues waiting on Microsoft's resolution on certain errors encountered."

After complete source extraction and integrity testing, the content was successfully transferred to SharePoint. Any minor problems were always resolved in close consultation with Xillio's project manager. Issues were well documented, and they were taken to closure with analytical test results. When necessary, Xillio's in-house specialists were called in to ensure a quick turnaround.

● Improved user experience

In the new environment, all documents were sorted into unique loan number specific folder, making them easy to aggregate and access – achieving a key objective of the migration. Archana Bavaswamy Rao: "We wanted to improve the user experience. Together with Xillio, we made sure employees benefit from the Microsoft folder and subfolder structure and the user-friendly search function. All with the familiar Microsoft look and feel. Loan-related documents are now much more accessible, and it's easier to upload content. We want people to be able to do this with as few clicks as possible, so they can focus on their core tasks. Uploading documents used to take at least five clicks, now it's just one."

Searching for documents is also much easier in SharePoint. Since the index is built over time, it was important to take the time to test this and simulate user experience before the new platform was made available to end users. To accelerate adoption, end users were involved early in the process. For example, a transition council of key users was set up to provide user feedback throughout the process.

● An eye for technology and business

Archana Bavaswamy Rao looks back positively on the project and the cooperation with Xillio. "Xillio clearly understands the migration process from A to Z. Everything was well prepared, and the employees were also closely involved. Combined with Xillio's knowledge and experience, the migration process went as expected. The fact that they not only have an eye for the technical issues but also understand the business aspects is a real bonus. That certainly contributed to the improved user experience we achieved with SharePoint. Our people can now serve our customers even better and faster."

About Xillio

These days, your organization needs to be agile to stay relevant. The same goes for your enterprise content. But where to start? The more complex your enterprise content, the more daunting it seems to take the leap.

That's where we come in. With over 20 years of experience, Xillio is your trusted partner for managing complex, high-volume content migrations within the Microsoft ecosystem. From metadata transformation to link redirection, our experts ensure your move to Microsoft 365 is smooth, compliant, and future-proof.