



10 myths about moving your RIA to the cloud

What RIAs really need to know about moving to Microsoft Office 365



Most organizations that choose to move to the cloud do so because they have decided they need it for business agility and want the cost savings that come with it.

How can you know whether or not you're getting it all?

If you're considering Microsoft Office 365 as your first step in moving applications to hosted solutions, you may have found similar inconsistencies in your research—making it difficult to separate fact from fiction.

A common misconception about Office 365, for example, is that it is simply a version of Office accessed by a browser.

To help in your migration to the cloud, we've created this myth-busting guide for all-things Office 365. When considering Office 365 to power your business, you need to know the facts. You depend on it.

Myths

- 1** Office 365 is just Office tools in the cloud, and I can only use it online.
- 2** If our data moves to the cloud, we will no longer have control over our technology.
- 3** Keeping data on-premises is safer than in the cloud.
- 4** I have to move everything to the cloud; it is an all-or-nothing scenario.
- 5** Cloud migration is too much for my business to handle.
- 6** Corporate spies, cyberthieves, and governments will have access to my data if it is in the cloud.
- 7** I have to learn all new tools to manage SharePoint Online.
- 8** Skype and Skype for Business are one and the same.
- 9** Email isn't any simpler in the cloud.
- 10** Continuously updating Office 365 will break my critical organization applications.

Myth 1

Office 365 is just Office tools in the cloud, and we can only use it online.

Fact

Office 365 is the Office you already know, plus productivity tools that will help you work more efficiently.

Whether at your desk or on the go, you have the tools to focus on the work that matters to your RIA. And, since Office 365 lives in the cloud, these tools stay up to date, are simple to use and manage, and are ready to work when you are.

These tools include:

- SharePoint Online and OneDrive for Business for collaboration, websites, workflows, and enterprise file sync and share (available across all plans)
- Skype for Business for voice, IM, meetings, and presence (available with all enterprise plans)
- Yammer for social collaboration (available with all enterprise plans)
- Public Switched Telephony Network (PSTN) conferencing to dial into Skype meetings from anywhere (available with Enterprise E5 plan)

- Advanced analytics, with Power BI and Microsoft MyAnalytics (available with all enterprise plans)
- Advanced security, with Advanced Threat Protection and Customer Lockbox (available with Enterprise E5 plan)

Plus, with many Office 365 plans, you can install the latest full Office applications on your devices, so you can work offline or online in Word, Excel, PowerPoint and Outlook too.

Myth 2

If our data moves to the cloud, we will no longer have control over our technology.

Fact

You still have total control over technology, but your IT department won't have to worry about constant updates.

When you move to the cloud, time spent maintaining hardware and upgrading software is significantly reduced—eliminating headaches with it. Now your IT team can focus on advancing your organization's technology, rather than being a repair service. Plus, you will have more time to spend improving operations and launching initiatives.

Instead of spending more and more portions of your budget on servers for email storage and workloads, you can think strategically and support organizational managers in a much more agile fashion, quickly responding to their needs.

Myth 3

Keeping data on-premises is safer than storing it in the cloud.

Fact

Security and uptime come standard with Office 365 in the cloud.

“It’s becoming increasingly clear that your on-premises systems aren’t inherently more secure than they’d be in the cloud,” says Mark Anderson, founder of the INVNT/IP Global Consortium, a group of governments and security experts solving the growing cyber theft problem. “Many organizations are routinely hacked and don’t know it,” says Anderson.

Even if your RIA has a growing security team, organizations can rarely assemble a team large enough to uncover and protect against the hundreds of possible alerts that come through each day. When you switch to Office 365, we act as an extension of your security team. Microsoft data centers are built with scale in mind.

To keep Office 365 security at the pinnacle of industry standards, our

dedicated security team uses a wide range of processes including the Security Development Lifecycle; traffic throttling; and preventing, detecting, and mitigating breaches at an enterprise level.

And, Microsoft Office 365 has a 99.9% financially backed uptime guarantee.

To protect against external threats, Office 365 gives you the option to use Advanced Threat Protection to secure mailboxes against sophisticated attacks in real time. Every email attachment or link is automatically evaluated for suspicious activity, and malicious content is neutralized before the chance of a risk.

Additionally, we staff industry-leading regulatory compliance experts. We know and keep up-to-date with the latest regulations and rules, such as HIPAA and Sarbanes-Oxley, Federal Information,

Security Management Act (FISMA), ISO 27001, European Union (EU) Model Clauses, U.S.–EU Safe Harbor framework, Family Educational Rights and Privacy Act (FERPA), and the Canadian Personal Information Protection and Electronic Documents Act (PIPEDA), just to name a few.

To learn more about Office 365 security and compliance, visit Office 365 Trust Center.

Myth 4

I have to move everything to the cloud. It is an all-or-nothing scenario.

Fact

You can move to the cloud at your own pace, or use a hybrid approach.

While some early cloud supporters advocated for moving your entire organization to the cloud all at once, this isn't a process that needs to happen overnight. Most implementations start with a hybrid approach—moving a single workload, like email, and growing from there.

The hybrid cloud creates a consistent platform that spans data centers and the cloud, simplifying IT and delivering apps and data to users on virtually any device, anywhere. It gives you control to deliver the computing power and capabilities that your organization demands and to scale up or down as needed without wasting your onsite technology investments.

As many RIAs move their productivity workloads to the cloud, the path for each workload is different, and the time it takes for those migrations varies. We can help you move workloads such as file sync-and-share or email first, and then help you figure out the right long-term plan for more difficult or larger projects.

Myth 5

Cloud migration is too much for my RIA to handle.

Fact

We're here to help every step of the way.

When you start considering how to move petabytes of data to the cloud, it's easy to see why some people think "going cloud" is too big a challenge for IT departments and staff, alike. We're not going to tell you it's simple, but you really can get Office 365 up and running quickly.

We'll help you every step of the way, with information and tips on firewall configurations, reverse proxy requirements, identity options, migration possibilities, and a phased approach for hybrid setups. We've created several paths you can follow, and in most cases, you can use your existing tools and processes throughout the migration, so day to day work won't be disrupted.

We provide an array of online tools to help you, too. As a customer you can take advantage of Microsoft FastTrack for Office 365, our customer success

service that helps you smoothly and confidently move to Office 365 and delivers faster business value, free with your subscription.*

We also have plenty of information on how to set up Office 365, where you can learn more about each application, as well as find tips on how to get your teams excited to use Office 365 in our Adoption Center.

Myth 6

Corporate spies, cyber thieves, and governments will have access to my data if it is in the cloud.

Fact

It's your data, not anyone else's.

This is a top fear about the cloud, but it is unfounded. Your IT team manages access, sets up rights and restrictions, and provides smartphone access and options. Further, your organization remains the sole owner. You retain the rights, title, and interest in the data stored in Office 365.

When safeguarding your data, we operate under several key principles:

- We do not mine your data for advertising or for any purpose other than providing you with services that you have paid for.
- If you ever choose to leave the service, you take your data with you.
- Privacy controls allow you to configure who in your organization has access and what they can access.
- Extensive auditing and supervision prevent admins from unauthorized access to your data.

- Customer Lockbox for Office 365 leaves customers with explicit control in the rare instance a Microsoft engineer may need to access customer content to resolve an IT issue.

Strict controls and design elements prevent your data from mingling with that of other organizations, and our data center staff never has unprivileged access to your data.

Microsoft is the first major cloud provider to adopt the world's first international standard for cloud privacy. The standard establishes a uniform, international approach to protecting privacy for personal data stored in the cloud. It reinforces that:

- You are in control of your data.
- You know what's happening with your data.

- We provide strong security protection for your data.
- Your data won't be used for advertising.
- Microsoft encourages government inquiries to be made directly to you unless legally prohibited and will challenge attempts to prohibit disclosure in court.

Myth 7

We have to learn all new tools to manage SharePoint Online.

Fact

SharePoint Online abstracts maintains the infrastructure, without changing anything else.

All of your hard work learning how to manage SharePoint is not lost! SharePoint Online shares the same familiar administration and management tools, whether your deployment is in the cloud, on location, or in a hybrid of the two. Although your customizations aren't populated to the cloud, all the administrative controls remain the same.

When moving to SharePoint Online, you no longer need to bother with controlling the workload implementation—instead, your IT team can focus on controlling its configuration. With the convenient, one-time, expert-led implementation that SharePoint Online handles, your IT team can reallocate time they used to spend on implementation and can concentrate on building strong, strategic tools for the organization. SharePoint Online simply abstracts the infrastructure, enabling you to focus on the solution.

Myth 8

Skype and Skype for Business are one and the same.

Fact

Skype for Business is your link to hosting productive meetings, not just phone calls.

The version of Skype you use at home is great for a small number of users and is free, unless you want to make calls to landlines and mobiles.

Alternatively, Skype for Business lets you add up to 250 people to online meetings, gives you enterprise-grade security, allows you to manage employee accounts, and is integrated into your Office apps. With the use of Skype Meeting Broadcast, you can host virtual meetings connecting up to 10,000 participants.

Skype for Business integrates with Office 365, boosting productivity by letting people connect on their terms. Staff can make and receive calls, give presentations, and attend meetings on one application.

For example, staff can:

- Instantly see when someone is busy or available.
- Start an instant messaging session by double-clicking a contact name.
- Share a desktop during a meeting.
- Invite outside partners to join a meeting via a full-feature Web-conferencing experience.
- Integrate video through a webcam for a call or a conference.

With Skype for Business, you don't need to have a dedicated administrator to be able to run servers or invest in additional infrastructure. We take care of it all for you. As a part of Office 365, Skype for Business offers users new features, upgrades, and patches as soon as they are ready.

Both the business and the consumer versions can also be federated, so that communication is possible between platforms. And service is supported around the clock. Of course, your IT team is empowered to manage settings, access, and security, but we handle everything on the backend.

Myth 9

Email isn't any simpler in the cloud.

Fact

With automatic updates, you don't have to worry about email downtime.

When you move your organization's email to the cloud, you can rest easy knowing that the experts who created the software are taking care of the maintenance and updates. Your IT team no longer needs to worry about installing updates, and can instead focus on bigger IT needs. Software updates and fixes are delivered automatically as soon as they are released. However, your IT team can always pause these updates or control when they happen through the Exchange Admin Center.

Myth 10

Continuously updating Office 365 will break my critical business applications.

Fact

Office 365 updates won't negatively impact your existing applications.

We know that a lot rides on your staffs' ability to use mission-critical apps and add-ins with Office. We are committed to Office 365 compatibility with the tools you use every day. Here's how we do that:

- Offer the same worldwide standard of desktop applications with the familiar tools you know and love, including Word, PowerPoint, and Excel.
- Work hard to ensure that even as we update Office on a regular basis in the cloud, the updates do not impact other software applications. For example, for the past 24 months, monthly Office 365 releases have not resulted in object model or API changes. If your organization-critical solutions work with Office 2010 or Office 2016 today, it is likely they will work with Office 365.
- Collaborate closely with leading software vendors and provide them tools and early access to ensure that their Office-compatible solutions continue to work with Office 365.
- Provide customers with guidance and best practices for update management and development to help you avoid compatibility issues.



Your IT team is busy managing disconnected systems, applications, and data with inflexible and slow systems. They take flak from employees and partners demanding access to the corporate network, as well as new tools. It's hard to squeeze in even a few minutes to keep up with new products and evaluate everything you hear.

Now that you have a better understanding of the productivity and collaboration that Office 365 provides, let us help you streamline the process. Feel free to share this with colleagues who need help separating fact from fiction when it comes to Office 365 in the cloud. It's good to be on the same page, and you'll save time by not having to argue about these myths.

Interested in learning more about Office 365?

Contact us for more information and next steps.

www.RIAWorkSpace.com

