

CASE STUDY:

Achieving Compliance and Security in the midst of M&A Activity

Customer Profile

The company is a large financial management service provider specializing in assisting individuals with self-directed care through various Medicaid programs. They provide support to help people stay in their homes and receive care from their chosen caregivers, including friends or family. This model is self-directed care, and the company offers resources and services to facilitate this personalized approach to healthcare.

Business Challenge

The company was confronted with a formidable task, a result of merger and acquisition (M&A) and divestiture activity. The company had to segregate its UK and US environments, a task made complex by the diverse array of Personal and Shared Mailboxes, Personal and Company Data/Content, Power Automate Flows, Power BI Reports, and Power Apps forms. This separation was not just a matter of compliance with UK GDPR and US regulatory standards, but a crucial step to avoid severe government penalties and data breaches. The company wanted to ensure that their customers' data was protected and that their business processes were not disrupted during the transition.

Solution Provided by ampiO Solutions

The company engaged ampiO Solutions, a Microsoft Gold Partner and a cloud migration and modernization leader, to help them with this complex and challenging project. The team at ampiO devised and executed a comprehensive solution that involved:

- **Creation of a New Environment**
ampiO created a new environment and migrated all the data that needed to be separated, using best practices and tools such as SharePoint Migration Tool, Azure Data Factory, and Power Platform Migration Tool.
- **Data Migration**
All data requiring separation, including personal and shared mailboxes, company data, Power Automate Flows, Power BI Reports, and Power Apps forms, was meticulously and comprehensively migrated to the new environment.
- **Compliance Support**
Ensuring compliance with UK GDPR and US regulations, ampiO replicated the workflows of the company to maintain business continuity.
- **Data Governance and Rationalization**
ampiO implemented thorough data governance and rationalization processes before the migration to streamline the data estate and ensure that only necessary data was moved.
- **Security Audit Preparation**
ampiO's meticulous approach ensured the new environment was ready for and passed a rigorous third-party security audit.

Business Benefits Realized

This M&A activity achieved the minimal requirement of data and digital asset separation and positioned the company to meet its global business obligations with a robust compliance framework.

The key benefits realized included:

- **Regulatory Compliance**
ampiO's deep understanding of UK GDPR and US regulatory requirements ensured that the migration process adhered to all relevant laws, thus avoiding future fines and legal issues.
- **Prevention of Data Leaks**
By implementing stringent data governance protocols and secure migration practices, ampiO prevented potential data leaks that had previously plagued the buyer.
- **Successful Security Audit**
The new environment passed a third-party security audit, confirming the integrity and security of the isolated environments.
- **Future-proof Compliance**
The robust compliance framework, meticulously implemented by ampiO Solutions, has shielded the company from potential regulatory pitfalls and fines, paving the way for a secure and compliant future.

Conclusion

By partnering with ampiO, the company achieved its business objectives and maintained customer satisfaction and trust. The company continued providing high-quality services to its customers in the US and UK markets while complying with the relevant regulations and standards. As a result, it now confidently operates in its separate UK and US environments. It is secure because it meets all regulatory requirements and has mitigated risks associated with data breaches and compliance failures. ampiO delivered the project on time and budget, with minimal impact on the end users and business operations. The collaboration with ampiO Solutions has resolved immediate challenges and established a foundation for ongoing compliance and security success.