Modernizing SharePoint: A Public Utility's Path from On-Premise to Microsoft 365

Industry: Public Utilities

Service Provided: SharePoint On-Premise to Microsoft 365 Migration

How Bravo Empowers Digital Transformation

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One of the largest public utility providers in the U.S., serving nearly 880,000 residents and over 400,000 homes and businesses, faced the growing challenge of an outdated SharePoint 2013 on-premise environment. With a broad service footprint and a deep responsibility to the communities it powers, the organization required a modern digital workspace that could support secure, scalable, and efficient operations.

Bravo Consulting Group was invited to partner in this transition, bringing not just deep technical expertise, but also a highly collaborative approach and a strong commitment to long-term client success. Together, we led a strategic and collaborative migration aligned with operational needs to modernize their environment through Microsoft 365.

The Challenge

The legacy SharePoint environment was riddled with non-standard components, hardcoded URLs, and a complex site hierarchy that hindered governance and usability. Many sites were abandoned or unused, creating unnecessary clutter and potential security vulnerabilities. The presence of highly sensitive data (PII, PHI, PCI) demanded strict compliance with federal standards such as NIST 800-53, FIPS 140-2, and PCI. Moreover, existing dependencies on unsupported third-party tools like Bamboo List Search and Calendar complicated the transition.

From a user perspective, there was concern over potential disruptions during the migration, as well as a knowledge gap in managing and navigating the new M365 environment. Governance practices were largely manual, inconsistent, and unscalable.

Our Approach

Bravo led the engagement as a strategic partner, applying a proven methodology tailored to the client's priorities. Our approach combined technical rigor with adaptability to stakeholder needs, and was executed through a phased, multi-layered strategy:

1. Discovery & Planning
Conducted a thorough assessment to map existing architecture, identify risks, and establish a clear, stakeholder-approved migration roadmap.

2. Secure Migration

Transitioned to a flat site structure, modernized non-standard components, and replaced outdated third-party tools with native M365 solutions. Sensitive data was secured using Microsoft Information Protection tagging, role-based access controls, encryption, and audit trails.

3. Governance Framework

Collaborated with the client's M365 Platform Management Team to develop a comprehensive governance package focused on content lifecycle, automated site provisioning, and compliance.

4. Modern Search & Calendars

Replaced deprecated tools with Microsoft Search enhanced by metadata tagging and PnP Modern Search Web Parts. Event management was modernized using integrated SharePoint calendars and Outlook connectivity.

5. Training & Change Management

Co-created a people-centered change management and training program, ensuring that the transition was not only technically successful but also embraced across teams. Delivered targeted training for ITS administrators and end-users through live sessions, recorded tutorials, and custom job aids.

Results & Business Impact

- **Improved Governance**: Established a repeatable, scalable governance model aligned with compliance requirements.
- **Enhanced Security**: Achieved secure handling of sensitive data in accordance with NIST, FIPS, and PCI standards.
- **Operational Efficiency**: Eliminated legacy tool dependencies and streamlined workflows with native Microsoft 365 functionality.
- **User Empowerment**: ITS staff and end-users adopted the new environment confidently, reducing reliance on support and boosting productivity.
- **Future-Readiness**: Built a foundation for continued growth and innovation within the M365 ecosystem.

Looking Ahead

This initiative demonstrates what's possible when expertise, precision, and alignment with client priorities come together. Bravo Consulting Group helped the organization navigate a complex SharePoint migration with clarity, security, and confidence, laying the groundwork for long-term success in Microsoft 365.

Ready to simplify complexity and modernize your digital workplace?

Let's connect and explore how Bravo can help you build a secure, scalable, and collaborative environment tailored to your organization.

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