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VIRGINIA'S ENTERPRISE MESSAGING TRANSITION

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Enterprise IT Management Initiatives Category

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VIRGINIA'S ENTERPRISE MESSAGING TRANSITION

Executive Summary

The Virginia Information Technologies Agency (VITA) manages the Commonwealth of Virginia's information technology (IT) enterprise, overseeing governance, infrastructure, procurement and security services for Virginia's almost 70 executive branch agencies and nearly 60,000 state employees. Successfully serving customers across this expanding portfolio of diverse disciplines, disparate geographical locations, various in-person and virtual work environments, and considering ever-changing technological needs can be challenging on any given day.

In 2021, VITA approached the end to one of the enterprise's largest, most impactful contracts for customers – the messaging contract. The contract included new services for email, calendar archival, mobile device management, online storage, productivity suites and collaboration services. The efforts would include full migration and transition to a new email and messaging supplier and new platform, changing from Google to Microsoft 365. To fully engage and prepare all 60,000+ enterprise end-user customers, and successfully complete a project of such vast scope and high-profile nature, the agency built a comprehensive, customer-focused approach.

In addition to the scope and complexity, the project team met other forces of change. 2021 was an impactful election year in Virginia, seeing a party change in the state gubernatorial administration, and igniting several layers of changes in cabinet and agency leadership levels during key decision-making milestones. As the project activities ramped up in late 2021 and early 2022, the project needed new and additional socialization at all levels for executive buy-in, appropriate resourcing, and support to roll the project out to all agency customers.

Project Narrative

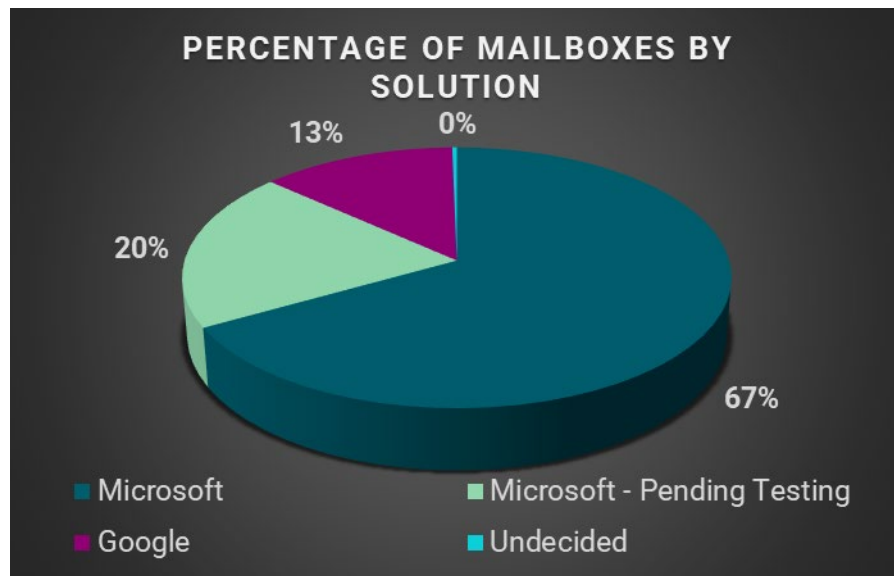
Idea:

What started as a messaging migration project morphed over time into a full messaging transition project. As VITA approached the end of its messaging contract, the agency engaged its key stakeholders, including agency information technology resources, chief information officers, information security officers, and other technologists to fully understand changing needs in Virginia's evolving tech landscape.

The Virginia executive branch enterprise, which includes nearly 70 separate state agencies, had moved to the Google messaging platform from Microsoft in March 2018. By ensuring that customers had inside information and widespread engagement on the decision-making, VITA facilitated customer representation on platform sourcing committees, advisory council meetings, surveys and other feedback mechanisms. As the project procurement and implementation process progressed, agency customers shared feedback that indicated a split as to whether they wanted to remain with Google or transition back to Microsoft. Hearing customers' desires for choices, VITA's project and procurement teams built a flexible proposal process, allowing customers to make a choice between the two platforms to best serve their needs.

With customer input and partnership, the contract was awarded to NTT DATA in the summer of 2021. Through additional research, exploration and testing of the platforms, more and more agencies began to express a desire to move to Microsoft, with the final survey determining that a steep majority, approximately 67%, of enterprise customers wanted to switch. Aligned with

VITA's vision to be Virginia's most customer-focused technology partner, the agency began to explore a full enterprise transition, which would realize additional new benefits for customers overall, including streamlined collaboration opportunities, cost efficiencies and consolidated toolsets.



Customer surveys tracked changing desires and needs for specific platforms, with the final survey indicating that more than 67% of agencies preferred a switch to Microsoft

The new approach also aligned with the vision of Virginia's new gubernatorial administration. Governor of Virginia Glenn Youngkin was elected in November 2021 and inaugurated in January 2022, which was a pivotal decision-making time during the project. VITA saw several executive leadership changes around this same period, which prompted additional exploration and revisiting of key project components. The new administration supported the new approach to a singular platform transition, and sought to be an early adopter of Microsoft, too. The project team, understanding the high-profile needs and wanting to provide an excellent customer experience for the new governor's office, both ramped up and accelerated its customer experience efforts, ensuring that the new executive staff received project presentations and regular updates to track actions and outcomes.

The project, aligned with the agency's overarching needs and goals, also addresses and meets several of the top 10 IT priorities identified by the National Association of State Chief Information Officers (NASCIO) for 2023: 1. Cybersecurity and risk management, 2. Digital government/digital services, 3. Workforce, 4. Legacy modernization, 7. Consolidation and optimization, and 10. Customer relationship management.

Implementation:

The project team determined that programmatic and full-scale success could be realized if they focused on leadership engagement, appropriate levels of communication, ample end-user training, and the customers' collective and individual experiences.

The VITA team was committed to customers' success; with this in mind, the team decided that VITA would be the first agency to complete migration activities to help achieve the following goals:

- Compile lessons learned for enterprise use
- Ensure appropriate levels of awareness and engagement across VITA's agency contacts, other suppliers and internal end users
- Build a process that will be easily transferable for future customer migrations
- Ensure continuity of operations for staff with little disruption
- Continually refine the migration process

Once determined, the team built a few early migration opportunities with interested agencies, including the new Office of the Governor, his Cabinet and nearly 200 staff members.

Supporting customer needs across the enterprise

The customer experience is critically important to VITA. So much so, that the agency hired its first chief customer experience officer during the course of the project. The project required close partnership and collaboration with customer agencies. Agency representatives were included in every step of the process – proposals, procurement, selection, integration, implementation and execution.

Scheduling

Timing is important. Each agency has cyclical activities, deadlines, and specific needs throughout the year. VITA worked closely with each agency to determine the best migration timeframes to be least disruptive to their own services, while also working to stay on track with the overall schedule for completion. For example, the Department of Taxation would not be migrated during tax season, and the Virginia Department of Transportation would not migrate during seasons more prone to severe weather, such as winter or hurricane seasons.

Migration weekends

Migration activities were completed during weekends to ensure minimal disruption to customers; the project team closely monitored activities around the clock, completed testing and quickly addressed any issues that arose. While most customers would log off of Google on Friday and log onto Microsoft the following Monday, accommodations were made for individuals who needed email access over the weekend for critical functions.

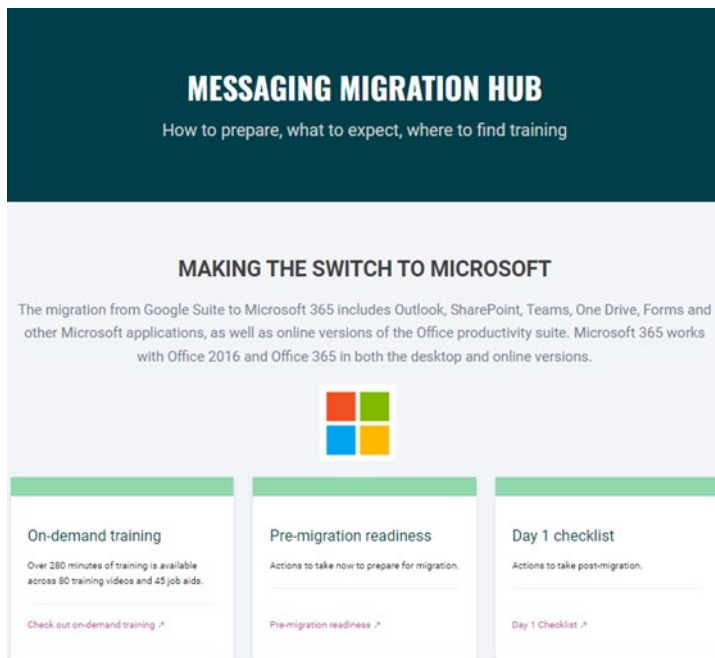
Communications to an enterprise to prepare and take action

The VITA-team developed a full communications plan, complete with templates, a suggested schedule, and one-page checklists to help agency IT colleagues communications internally to their own agencies' internal teams. While the pre-migration activities could easily be shared via regular communications channels, the team needed to consider additional resources for the time period just following migration.

Employees heavily rely on their email, calendars, and chat messages across desktop and mobile devices to communicate, store and access information, and remind them of meetings and other actions to take. What happens when you temporarily lose access to those applications on the very day you need them to get back to work?

The Messaging Migration Hub online

Enter: the [Messaging Migration Hub](#). The communications and customer teams built customer journey maps and identified different needs along the way, including the major information gap: providing a hub of information, training, video guides, a pre-migration checklist, and a Day 1/go-live checklist of actions to take.



The [messaging migration hub](#), housed on VITA’s external website, ensured connections to critical information on go-live days

Training

The project team, in partnership with its supplier, NTT DATA, created nearly 80 training materials, including 14 job aids and 64 video walkthroughs to help customers across the enterprise virtually complete various tasks in the platform.

In-person support from VITA volunteers

Recognizing how daunting it can be to need to walk through technical steps to just simply get back to work, VITA’s new chief information officer, Robert Osmond, a former VITA customer, came up with the idea to provide the ultimate partnership experience. VITA would offer the opportunity for its employees to show up to the respective go-live days for every agency, walk through the go-live activity steps with them, and ensure that they could quickly return to regular duties following migration.



VITA volunteers helped ensure the success of the messaging migration initiative.

Following VITA's own migration activities, the project team called for volunteers to join supplier representatives in downtown Richmond for go-live activities for the new governor's office, the new cabinet and approximately 200 staff members. On go-live day, dozens of VITA team members were deployed to support the state's executive staff to ensure a smooth process, working individually with each team member to complete all activities on all desktop and mobile devices and troubleshooting any issues as needed.

Impact:

By May 2023, the project was completed on-time and on-budget, transitioning more than 72,475 user accounts, migrating more than 1.6 billion objects with a 99.9% success rate, and keeping all 69 state agencies' operations moving throughout the duration of the project uninterrupted. Once wrapped, the project provided multiple other benefits:

- Integrated toolsets that allow for cost savings and streamlined workflows
- The ability to leverage Microsoft's information security tools
- Reduction of third-party tools needed to support a multi-messaging environment
- Reduced operational complexity and costs
- Elimination of redundant workplace productivity tools

The success of the messaging transition project spotlights how states can truly implement a modernized, enterprise-wide approach, which allows the customer base to benefit from streamlined process efficiencies, economies of scale, and consolidated collaboration opportunities while also providing for opportunities for close strategic partnerships and flexibility for any needed customer-specific customization.