

DAYONE+ PORTFOLIO

Multi-site separation from a shared legacy estate.

A family office and investment group separating from two shared Active Directory forests and a legacy on-premises estate spanning offices and rural estates.

CORPORATE RESTRUCTURE / FAMILY OFFICE / INVESTMENT GROUP / UK & SOUTHERN AFRICA

AT A GLANCE

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Legacy AD forests consolidated into a dedicated identity platform

9+

Sites migrated, from head offices to remote estates

8 yrs

From carve-out delivery into ongoing strategic partnership

A family office and investment group separating from two shared Active Directory forests and a legacy on-premises estate spanning offices and rural estates, evolving into an eight-year strategic partnership.

THE CHALLENGE

A newly formed family office and investment group had to separate from two shared Active Directory forests and a legacy on-premises estate. Sites ranged from head offices to remote estates with limited connectivity. Identity, collaboration, network, telephony and video conferencing all had to be re-platformed without disrupting principals, family members or portfolio operations.

OUR APPROACH

- 01 Identity was redesigned first. Everything else followed the new identity plane.
- 02 Sites were sequenced by dependency and connectivity, not by convenience.
- 03 Telephony, video and WAN were re-platformed alongside identity so the estate was consistent at cutover.
- 04 The delivery team stayed in place and evolved into the long-term technology function.

WHAT WE DELIVERED

- Two legacy AD forests consolidated into a dedicated identity platform.
- Microsoft 365 migration with SharePoint data carve-out from the shared estate.
- WAN, firewall, telephony and video conferencing transition across nine-plus sites.
- Long-term governance model, still active at the eight-year mark.

“It started as a separation programme and became our technology function. The same people who cut us over now sit at the steering committee.”

GROUP COO, FAMILY OFFICE AND INVESTMENT GROUP

WHAT WE TOOK FROM IT

- 01 Separation programmes that ignore identity fail slowly and expensively.
- 02 Remote sites are not smaller versions of head office. They need their own connectivity and support model.
- 03 The team that cuts the client over is often the right team to hold the steering committee seat.

ABOUT NUMATA

Numata is a business technology services and solutions provider for small and mid-sized enterprises. We align technology to business outcomes across IT strategy, cyber, data, operations, modern work and AI, delivered through NumataOne™, our strategy enablement framework.

Speak to the team: numata.co/contact