CLOUD STRATEGY FOR THE WHOLE ASSOCIATION

What is it and what does it take?

3/25/2020
Presenters

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Not For Profit Practice

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Director
Not For Profit CRM Technologies

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National lead for Modern Workplace
RSM’S INDUSTRY EXPERIENCE
Our commitment to the nonprofit community

Local and national RSM professionals are continually active in the nonprofit community. Whether it is serving as a board member for a local nonprofit organization, volunteering for a firm-arranged community service project or donating to organizations, our professionals understand the importance of nonprofit service.
### Muse newsletter

Bi-monthly resource for recent accounting and auditing developments impacting the nonprofit industry. Recent articles include:

- Exempt organization-specific provisions in the House Bill H.R. 1
- Going global: How to plan strategy and building local relationships
- Nonprofit webcast series: Optimizing your nonprofit’s outsourcing strategy
- 10 questions every board should ask of its athletics department
- On-demand webcast: Annual tax update for nonprofit organizations

### Nonprofit Summit

Held annually, the Summit attracts nonprofit executives who participate in a half or full day CPE event. Topics of discussion include:

- Nonprofit accounting update
- Tax update including Form 990 and areas of tax focus for exempt organizations
- Leveraging technology to modernize your finance function
- Not-for-Profits ≠ Not for Attackers – an in-depth look at how your organization can address a potential breach

### Webcasts

Monthly webcast presentations on topics of importance to our clients, including:

- Annual nonprofit tax update
- Annual nonprofit accounting update
- Optimizing your nonprofit’s outsourcing strategy
- 4 considerations for nonprofits when operating globally
- Annual federal grants management update
- Utilize your nonprofit’s data to drive better decision-making
iMIS webcast series

• Unleash the power of your iMIS data - May 20, 2020 1pm EDT
• iMIS Tips and Tricks - September 16, 2020 1pm EDT
• What’s in the new iMIS release – November 11, 2020 1pm ET
RSM iMIS Consulting Practice

• Our consultants go beyond implementing new software—we offer a broader business perspective to ensure the client’s technology investment returns organization performance improvement

• Authorized Solution Provider for 20+ years

• Highly Experienced iMIS Consultants

• Highlighted Honors from ASI (all multiple years)
  - Authorized Solution Provider of the Year
  - Innovative Solutions Awards
  - Customer Satisfaction Leader of the Year
  - Chairman’s Circle
  - President’s Club
  - Inner Forum

• Developers of 3rd party iMIS utilities that we resell through the iMIS channel

• Can provide Fit Analysis, Rapid Assessment, ERP including Dynamics GP, CPM, business analytics, infrastructure, hosting and other related services
RSM knows associations

RSM:
THE POWER
OF BEING
UNDERSTOOD

Process Improvement
Financial & Accounting Outsourcing
Outsourced IT

Risk & Penetration Testing
Security & PCI Compliance
Data Governance & Data Warehousing
Cloud Strategy

RFP Generation & System Selection
ERP & CRM/AMS Implementation
Membership Engagement & Experience

ADVISE
DELIVER
MANAGE

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CLOUD (R)EVOLUTION
Cloud computing is actually a spectrum of things complementing one another and building on a foundation of sharing. Inherent dualities in the cloud computing phenomenon are spawning divergent strategies for cloud computing success. The public cloud, hybrid clouds, and private clouds now dot the landscape of IT based solutions. Because of that, the basic issues have moved from ‘what is cloud’ to ‘how will cloud projects evolve.’

Chris Howard – Research Vice President at Gartner
RSM surveyed 500 CFOs across the middle market to understand how they are thinking about Digital Transformation. Overall, it is one of the single-largest priorities over the next 1-3 years.

Over the next three years, 84% of companies expect the amount of investment in customer experience technology to increase.

69% of CFOs share or own the responsibility for leading digital transformation.

55% see increased spending as the primary way to reach digital transformation goals.
Cloud continuum
Standard definitions - Cloud

- **Private Cloud** – Dedicated resources, such as vCPU and storage, isolated for a specific client.

- **Public Cloud** – Shared resources, such as vCPU and storage made available to general public, free or per-user model.

- **Co-location** – Hosting your IT assets in a third-party datacenter.

- **Hybrid** – Combination of any of the above.
Technology concerns – Prior to cloud

- Compromised Security
- Decreased Productivity
- Higher Maintenance Costs
- Problems with Scalability
- Non-Compliance
## Infrastructure and process limits

### Common themes

- Compromised Security
- Decreased Productivity
- Higher Maintenance Costs
- Problems with Scalability
- Non-Compliance

### Infrastructure Limits

- Limited access to remote ready workstations
- Licensing and entitlements for enabling remote workforce
- Specialty processes (Human to Machine interfaces)
- Access to on-premise devices and services
- Capacity on network and circuits
- Supply of workstations and equipment

### Operational Limits

- Low adoption of cloud technology
- Limited training on using cloud productivity tools
- Sensitive company data not adequately secured
- Specialty processes
- Access to monolithic or on-premise applications
Nonprofit digital trends

Operating in the Digital Age

- Microsoft Office 365
- Migration to Modern Systems
- Process-led Digital Transformation
- Back Office Outsourcing
  - IT Managed Services
  - Finance and Accounting Outsourcing
- Advanced Digital Transformation
Our research indicated that, regardless of industry, executives are expecting significant increases in attention and spending on several potential game-changing technologies for their organization.
CLOUD MIGRATION PLANNING
### Major End of Life // Upcoming dates

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>END OF SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft SQL Server 2008</td>
<td>7/09/2019</td>
</tr>
<tr>
<td>Windows Server 2008</td>
<td>1/14/2020</td>
</tr>
<tr>
<td>Exchange Server 2010</td>
<td>1/14/2020</td>
</tr>
<tr>
<td>Windows 7</td>
<td>1/14/2020</td>
</tr>
<tr>
<td>VMware ESXi 6.0</td>
<td>3/12/2020</td>
</tr>
<tr>
<td>Microsoft Office 2010</td>
<td>10/13/2020</td>
</tr>
<tr>
<td>VMware ESXi 6.5 &amp; 6.7</td>
<td>11/15/2021</td>
</tr>
<tr>
<td>Microsoft SQL Server 2012</td>
<td>7/12/2022</td>
</tr>
<tr>
<td>Windows Server 2012</td>
<td>1/10/2023</td>
</tr>
<tr>
<td>Microsoft Office 2013</td>
<td>4/11/2023</td>
</tr>
<tr>
<td>Exchange Server 2013</td>
<td>4/11/2023</td>
</tr>
</tbody>
</table>
Consulting approach

• Assess current systems and designs
• Plan for “Modern Workplace”
• Design for improved security controls
• Develop migration approach with transformative upgrades
• Stand-up Cloud managed services
• Execute migration tasks and cutovers
Where do we start?
## Typical starting point – Cloud Servers

### Enterprise Public Cloud Adoption

Percent of respondents running applications

<table>
<thead>
<tr>
<th>Cloud Provider</th>
<th>Running apps</th>
<th>Experimenting</th>
<th>Plan to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>AWS (Amazon Web Services)</td>
<td>68%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Azure</td>
<td>58%</td>
<td>22%</td>
<td>8%</td>
</tr>
<tr>
<td>Google Cloud</td>
<td>19%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>IBM Cloud</td>
<td>15%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>VMware Cloud on AWS</td>
<td>12%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Oracle Cloud</td>
<td>10%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Alibaba Cloud</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: RightScale 2018 State of the Cloud Report

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Front office products

- Primary Players are Microsoft Office and Google Docs
- Decision is usually tied to which email server users will be using
- Licensing and self service to follow

<table>
<thead>
<tr>
<th></th>
<th>Microsoft</th>
<th>Google</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word</td>
<td>Neutral</td>
<td>Google Docs</td>
</tr>
<tr>
<td>Excel</td>
<td>Leader</td>
<td>Google Sheets</td>
</tr>
<tr>
<td>Outlook</td>
<td>Leader</td>
<td>Gmail</td>
</tr>
<tr>
<td>Teams</td>
<td>Neutral trending toward Teams</td>
<td>Google Hangouts</td>
</tr>
</tbody>
</table>
Identify if servers are required

• File share drives
  - Move to Teams/SharePoint

• ERP System
  - Short term – Move to Cloud Server (Azure)
  - Longer term – system selection to a cloud based ERP System

• Client Server/Server Based Applications
  - Short term – Move to Cloud Server (Azure)
  - Longer term – replace with cloud based system
## Security/Authentication

<table>
<thead>
<tr>
<th>Security Service</th>
<th>AWS</th>
<th>Azure</th>
<th>GCP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentication/Authorization</td>
<td>Identity and access management (IAM)</td>
<td>Active Directory/Active Directory Premium</td>
<td>Cloud IAM/ Cloud Identity-Aware proxy</td>
</tr>
<tr>
<td>Data encryption</td>
<td>Key management service</td>
<td>Storage service encryption</td>
<td></td>
</tr>
<tr>
<td>Firewall</td>
<td>Web application firewall</td>
<td>Application gateway</td>
<td></td>
</tr>
<tr>
<td>Identity Management</td>
<td>Cognito</td>
<td>Active directory B2C</td>
<td></td>
</tr>
<tr>
<td>Cloud services (with protection)</td>
<td>Shield</td>
<td>DDoS protection service</td>
<td>DDoS protection service</td>
</tr>
</tbody>
</table>
CONCLUSION/TAKE AWAY
Take away items

• Most cloud transformations begin with selection of a provider
  - This is the most significant decision because it is not easy to reverse
  - An architect is most often used to make sure you are leveraging existing knowledge

• Migrating to new Front Office tools are usually the first significant step

• Next move tends to be email

• Evaluate what is now on your servers

• Looks that those applications that are left to see if they are needed

• Move files to a collaboration tool
Got ya’s

• Don’t forget about user adaptation.
• Security should be thought out at the onset of the project.
• No one likes to sign on twice.
• An architect is going to prevent rework. Not having on will most likely mean rework.
• Don’t forget mobile. It will be available. Take advantage.
• Don’t miss the opportunity to rethink the way you work.
QUESTIONS AND ANSWERS