Pharmacy group quadruples in size

CareRx counts on migration tools from Quest to deliver the seamless IT migrations required for its aggressive M&A strategy.

CareRx

Country: **Canada**

Employees: **1,600**

Industry: **Healthcare**

Website: **https://www.carerx.ca/**

Four tenant migrations in three years? No problem.

The IT integration required as part of any merger and acquisition (M&A) deal is never a walk in the park: It demands thorough assessment of all the infrastructure and data involved, detailed planning and preparation, and careful execution — often under tight deadlines.

But the IT team at pharmacy services provider CareRx faced even steeper challenges. Not only were they tasked with completing four separate migrations in less than three years, but each of those projects involved integrating only a selected portion of the organization being acquired. Moreover, the team needed to meet the stringent timeline requirements imposed by the M&A agreement and by Canadian healthcare regulations.

Nevertheless, the team was able to complete all the IT integrations successfully and emerge heroes, thanks to help from migration solutions from Quest.

About this case study

When CareRx adopted an aggressive M&A growth strategy, the company's small IT team knew they needed to be prepared to deliver successful IT integrations on tight schedules, and began searching for a best-in-class migration tool they could count on.

Solution

With On Demand Migration from Quest, the IT team has been able to deliver four seamless migrations to merge five separate tenants in less than three years — enabling CareRx to quadruple in size.

Benefits

- Delivered granular migration of exactly the desired portions of the target Microsoft 365 environment
- Enabled migrations of all key workloads — Exchange Online, SharePoint, OneDrive and Teams — from one powerful solution
- Ensured compliance with strict compliance mandates about migration timelines

Solutions at a glance

- Microsoft Platform Management

Growth by acquisition demands best-in-class migration tools.

CareRx is Canada's leading provider of specialty pharmacy services to seniors and their healthcare teams. The organization serves some 92,000 residents in over 1,500 senior communities, retirement homes, assisted living facilities and other group settings.

CareRx has quadrupled in size in less than three years through an aggressive acquisition strategy. Specifically, CareRx has acquired portions of four regional pharmacies: RemedyRx, Smart Meds, Rexall and Medical Pharmacies Group.

Microsoft 365 workloads are business-critical.

For each M&A, the CareRx IT team needed to integrate portions of another company's IT ecosystem into its own environment. While all sensitive information, such as patient medical records, is kept on premises in accordance with strict legislative mandates, core communication and collaboration processes run in the Microsoft 365 cloud — making tenant migration an essential part of completing the acquisition.

Strict regulations add complexity.

Most M&As involve tight timelines, but there are some unique challenges with a pharmacy acquisition. In particular, the IT team needed to finish each IT integration by the last day of the month because the new shop must open on the first day of the next month. With deadlines carved in stone and an IT team of just 10 to handle the migrations on top of all their other duties, CareRx needed a migration solution they could count on.

Quest On Demand Migration provides a comprehensive, straightforward solution.

As its first acquisition deal began to take shape, CareRx began considering how to ensure a seamless tenant migration. Since Microsoft provides limited functionality for tenant migrations, a third-party tool was clearly needed, so the IT team dug into the options. After multiple demos and thorough questioning of vendors about functionality and security, the choice was clear.

"I researched the migration tools available, and there really was no competition — Quest won hands down," says John Stevens, regional IT team manager at CareRx. "On Demand Migration was by far the most straightforward and logical solution, and the easiest to use." A powerful SaaS solution, On Demand Migration handles all core Microsoft 365 workloads, including Exchange Online, SharePoint Online, OneDrive and Microsoft Teams — and even on-premises Active Directory environments as well.

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Moreover, Stevens was impressed with the way Quest does business. "Quest never practiced high-pressure sales; they gave me the facts I needed," he notes. "It is a pleasure to do business with such a professional team."

Migrations proceeded "slick as butter."

With On Demand Migration in their toolbox, the IT team at CareRx was able to deliver one successful IT integration after another, consolidating five tenants in less than three years.

"Our first acquisition doubled our company's size. Plus, we were new to the On Demand Migrations solution — but it still went slick as butter," Stevens notes. "The next two acquisitions were smaller, and then the fourth was our largest, doubling our size again."

PRODUCTS AND SERVICES

Software

- On Demand Migration

Quest

Each time, the migration followed a similar pattern. "We've never acquired the entirety of an organization, only portions of it," Stevens explains. "Accordingly, we've always built the new user accounts and appropriate security groups in the target tenant and then done a match. On Demand Migration delivered the granular control we needed."

Email and OneDrive ready on day one? Check!

Seamless migration of email and files is critical to every IT integration project, so Exchange Online and OneDrive were a big focus of the CareRx IT team. "A common thread across all the acquisitions is that users always want their email ready on day one," says Stevens. "With On Demand Migration, we were able to migrate their email in batch well ahead of the target date, which dramatically shrank the time and effort required to perform the final delta migration on the last day. The OneDrive migrations were similarly straightforward."

Stevens emphasized the importance of clear and timely communication to the success of the migration projects. "We make sure to let the users know exactly when the cutover will happen and what to expect," he says. "We also provide a contact phone number or email address so they know exactly where to get help if they experience an issue or are confused about anything."

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> *John Stevens, Regional IT Team Manager, CareRx*

Seamless migration of SharePoint and Teams? Check and check!

On Demand Migration also supports easy and secure migration of SharePoint Online and Microsoft Teams. But while CareRx relies on these platforms for communication and collaboration, its early acquisitions did not make much use of them. "Only one of our acquisitions so far used SharePoint Online," Stevens notes. "On Demand Migration made the migration process quick and easy."

Stevens has yet to perform a Teams migration for CareRx, but he is very confident about the process. "On Demand Migration has made all of our tenant integrations a breeze," he says. "I can't say this enough: The product just makes sense. It's very intuitive and straightforward."

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>
> *John Stevens, Regional IT Team Manager, CareRx*

In fact, although IT integrations are commonly a key stumbling block for M&A deals, the Microsoft 365 migration was one area of the acquisition that the CareRx leadership team found it never had to worry about. Stevens puts it like this: "On Demand Migration makes the IT team look stellar to both users and management, time and time again."

For CareRx, Quest is the partner of choice today — and tomorrow.

Growth through acquisition has proven to be a very successful strategy for CareRx, and the IT team is confident it can keep up with whatever projects the business throws their way — as well as a few of their own — by taking advantage of additional capabilities of On Demand Migration.

The domain coexistence and domain migration features of On Demand Migration will be invaluable.

In particular, the IT team anticipates relying on the domain coexistence capabilities of On Demand Migration in their next M&A project. Plus, they're also planning to lean on the solution during an internal consolidation and cleanup effort.

Quest

"Like many organizations, we've discovered that our tenant isn't set up in an optimal way for our current needs," says Stevens. "So we're going to be migrating our existing tenant into a new tenant. The domain migration services in On Demand Migration will be invaluable in helping us make that transition smoothly."

Metalogix Essentials will provide additional capabilities.

In addition, the team will be investing in another Quest solution, Metalogix® Essentials for Office 365. This powerful tool will enable them to easily move and reorganize content from multiple cloud service providers and on-premises SharePoint and file shares, as well as manage permissions and licenses and gather key intelligence about user adoption — all from a single console.

Quality and reliability inspire trust.

"We trusted On Demand for our first M&A integration, and it delivered flawlessly, so we were comfortable trusting it for the next, and the next," Stevens notes. "Working with vendors who provide reliable, quality solutions is essential to our success, and we look forward to growing our partnership with Quest."

A straightforward recommendation for a straightforward solution

When asked what he would tell other IT pros about his experience with tenant migrations, Stevens was as clear and straightforward as the solution he's been relying upon: "If you're facing an Office 365 migration, you'd be a fool not to go with Quest."

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About Quest

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Quest Software. Where next meets now.

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