Placing Blind Trust in IT Solution Providers:
Even the Most Satisfied Clients Often Won't Go On the Record

Introduction

Because of the sensitivity of corporate and customer information, organizations often keep their IT successes to themselves. Not only are they concerned with the confidentiality of data, they are also hesitant to go public if they deploy a technology solution that might help competitors. Organizations also do not want to point out to the world any weaknesses they had to correct or if they manage major business transactions with off-the-shelf tools, such as Excel spreadsheets.

When looking to hire a company to deploy their solution, confidentiality is a primary concern, particularly for the financial services and healthcare sectors. Other industry sectors also often require strict confidentiality when it comes to their financial applications.

The need for data confidentiality also plays a role when solution providers ask customers to publicly discuss IT projects. End-users in the financial and healthcare sectors almost always refuse to go on the record. This is true even when they are completely satisfied and receive major cost-savings or revenue-generation benefits from a technology solution.

This makes it difficult for solution providers when attempting to win new customers with proof of past successes. Most do not want to be named in press releases and success stories since their corporate communications team requires them to protect proprietary information that might reveal how they transact business.

Measuring the Trustworthiness of Potential Partners

Due to these confidentiality requirements, the process for determining what solutions to deploy and which companies to collaborate with in the handling of sensitive data can be tricky. As described above, asking for references or success stories could be futile. They most often simply cannot refer you to anyone.

Thus, the process for determining which IT solution providers to work with should include a close examination of the procedures and policies for protecting confidential information. Taking this approach ensures all data remains secure and cannot be compromised in any way.

At ConverterTechnology, we deeply respect the confidentiality stance that nearly all our customers choose to take. We understand why financial and healthcare organizations as well as other corporations must be conservative when it comes to revealing corporate, customer and patient information.

Because of the needs of our customer base, which includes seven out of the top ten banks in the world as well as some of the largest pharmaceutical and energy companies globally, we have developed strict best-practice guidelines to ensure the Microsoft Office files we convert during upgrades with our automated software process remain confidential. When working directly with end-user customers or with one of our Microsoft Partners as a member of the upgrade team, we specifically rely on the following set of best practices—developed and refined over the course of many years working with sensitive information:

- We purposefully don't work in the cloud where the chances of data compromise are greater. Instead, our Microsoft Office conversion software is run within the end-customer's physical location, so all files are converted within client firewalls to add an extra layer of data protection.
- When we train personnel on our automated Office file upgrade processes, we collaborate closely with each customer's internal staff and/or the designated systems integrator. We often sit side-by-side with customer personnel so that all of our actions are transparent, and so the customer can be aware of all of our activities in real time.
- When we encounter a password-protected Office file, we don't attempt to bypass the password; we simply flag the file so customers can choose how they want to convert the files; either on their own manually or with our toolset discretely.
- We never view actual data within each file. Each Office file is scanned and remediated within 15-20 seconds, so there's literally not enough time to harm the file's data integrity. Most of the file interaction during our conversion processes takes place behind the scenes of the user-interface screens we interact with.
- Our software provides customers with full audit control so that every change we apply to fields, code, or worksheets can be easily viewed.

In addition to all of the above best practices, all ConverterTechnology employees are thoroughly vetted prior to hiring, including a third-party background check. For an even higher level of data security, we train either the client's internal resources or its designated system integrator resources to run our conversion software via a secure Intranet connection.

The Criticality of Partner Trust When Multiple Departments Are Involved

Using the best practices described above serves as the foundation for all of our customer engagements. An IT partner that follows practices such as these is particularly important for large organizations where the ownership for converting Microsoft Office files sometimes bounces back and forth among IT, finance and line-of-business managers.

The Office file data is most likely owned by the line-of-business, but the department often turns to IT for help when upgrading Microsoft Office. The finance department may get involved too if sensitive information is in play.

All these groups have a stake in protecting the data, but as IT projects run their course, the department that keeps close tabs on the data may not completely tune in to all file-conversion activities. An IT partner that applies carefully devised security best practices to maintain confidentiality is thus critical.

To further protect customer confidentiality, ConverterTechnology champions the concept of collaborating with customer system integrators when deploying our automated Office file conversion solutions. System integrators streamline the overall project timeline. They are also often in a unique position to help protect the sensitive information that financial and healthcare organizations work with—having established a long-term relationship along with the trust that comes from handling many IT technology solution deployments.

When prospects and/or partners bring us into a project, we usually ask right away, "Who is your systems integrator?" We know that working with this person will help ensure confidentiality and also facilitate the deployment of our solutions.

Automated Microsoft Office Conversion from ConverterTechnology

In addition to working with a trustworthy partner, enterprises currently migrating files to the most current version of Microsoft Office will need a partner than can help them with the extensive planning required to ensure the process flows as smoothly as possible. Applications such as Excel, Word, PowerPoint and Access will all present issues as users open files in the most current version of Office that were initially created in prior versions of Office.

Generally, 90 percent of Office files will not have any issues after the migration, but that leaves another 10 percent that will present varying degrees of problems and are often the most business critical files.

OfficeConverter from ConverterTechnology is the only third-party tool available on the market that speeds up file scanning, automated remediation and conversion to the most recent version of Office while also providing a greater level of granularity as to the extent of problem files. This helps IT prioritize which files to address first and to aid in proper project planning.

While our solution requires initial training, it is intuitive enough for an IT staff to utilize without additional support, if desired. OfficeConverter requires a modest software investment, but the ROI is high when considering the resource time and project risk that will be reduced significantly.

Our solution scans files for potential incompatibilities similar to the Microsoft OMPM tool, but OfficeConverter also provides superior reporting about Visual Basic compatibility issues and project references as well as links to other files. Each file scanned is assigned a numeric severity based on the most severe issue contained in the file.

Unlike OMPM, OfficeConverter automatically remediates and converts Office files quickly saving time and resources. Additionally, with our Click2Fix portal solution, we provide the added benefit of an intranet-based solution to allow users to nominate specific files for testing and/or conversion.

You will find out exactly why many anonymous organizations who are among the leading financial and healthcare companies in the world consider OfficeConverter to be their "secret" solution. We can provide a confidential strategic advantage by guaranteeing the success of your Microsoft Office file migration.

For more information on how Converter Technology can assist you with Microsoft Office file migrations while also ensuring the confidentiality of your data and your firm, contact us today at info@convertertechnology.com.

About ConverterTechnology

ConverterTechnology helps enterprises upgrade to new versions of Microsoft Windows and Microsoft Office without the risks, costs, productivity loss, and headaches that typically arise from enterprise deployments. By delivering automated software that streamlines migrations along with the expertise to plan, execute, and report on successful enterprise migrations, ConverterTechnology helps companies accelerate their time to productivity with the Microsoft platform. ConverterTechnology is headquartered in N.H., with offices in Europe and Australia, and is a wholly owned subsidiary of CPS Group Investments Pty Ltd.