

# Case Study

**K | ZVK.  
VK | PB.**



## KZVK & VKPB: Introducing M365 change that lasts

### Company Profile

The Kirchliche Zusatzversorgungskasse Rheinland-Westfalen (KZVK) and the Gemeinsame Versorgungskasse für Pfarrer und Kirchenbeamte (VKPB) operate together under one roof in Dortmund, Germany. KZVK provides occupational pensions for employees in church organizations and social welfare institutions, while VKPB secures pension entitlements for pastors and church officials.

<https://www.kzv-k-dortmund.de>

<https://www.vkpb-dortmund.de>

### Technologies

**#Microsoft 365**

**#Change & Adoption**

### Challenge

- Introducing new technologies alongside changing work practices and new collaboration opportunities
- Replacing Skype for Business (end of life), creating time pressure and technical dependencies

### Solution

- Introduction of Microsoft 365 with Teams Phone, SharePoint Online, and Microsoft Teams as the new digital workplace
- Design and implementation of sustainable change & adoption measures to drive communication, enablement, and user acceptance
- Use-case workshops and accompanying sessions with business departments to migrate existing SharePoint structures into the new Teams environment
- Gradual rollout with multipliers, extensive training programs, and target-group-specific change communication

### Benefit

- Cross-departmental collaboration within a unified and future-ready M365 work environment
- Improved access to knowledge and greater transparency through structured information architecture and integrated search capabilities
- Higher acceptance of new ways of working through early employee involvement, tailored workshops, and self-paced learning opportunities
- Secure migration of existing content and responsibilities into the new Teams environment
- Faster adoption of new tools and work practices through intuitive applications and role-based enablement

KZVK and VKPB faced the task of modernizing their existing Skype for Business telephony environment to ensure future viability. The end of support acted as a catalyst to consciously take the next step and simultaneously establish the foundation for a modern, collaborative digital workplace. The decision to adopt Microsoft 365 and Teams Phone was made early on. For KZVK and VKPB, one thing was clear: for the transformation to succeed, they needed a partner who could not only manage the technical implementation but also guide employees through the transition.

With novaCapta, they found the right partner – a team that shared the same vision of a modern digital workplace powered by Microsoft 365, brought deep technological expertise, and was able to bridge the gap between IT, business departments, and management. “In addition to these components, it was important for us to work with a partner capable of covering multiple aspects from a single source. The overall package was simply the right fit,” explains André Picker, Deputy Head of IT.

### **Sustainable Rollout with a Clear Roadmap**

To avoid overwhelming employees with too many changes at once, the KVK365 project followed a phased rollout approach. The first step was the introduction of Teams Phone – a transition that employees could easily relate to, as it functionally built upon their previous Skype for Business experience. At the same time, the project team planned the next stages: introducing SharePoint Online and Microsoft Teams as the foundation for collaborative work.

At the beginning of the year, novaCapta also supported the migration of existing SharePoint structures into the new Teams environment, helping to transfer content, work processes, and responsibilities into the new M365 ecosystem in a structured and sustainable way.

This phased implementation created space for acceptance and learning. KZVK and VKPB were therefore able to gradually familiarize employees with new ways of working while simultaneously building trust in the new tools.

### **Change & Adoption as a Key Success Factor**

The success of KVK365 was not based solely on technical excellence, but equally on a carefully designed change & adoption strategy tailored specifically to the overall project. The concept included communication measures, role-based training programs for employees and multipliers, as well as a central landing page serving as the communication hub throughout the project. All measures were designed to actively involve employees, build confidence in using Microsoft 365, and sustainably anchor new ways of working within the organization.

The training concept considered different learning styles, levels of knowledge, and technological affinities, enabling employees to explore relevant functions and content at their own pace.

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**We chose novaCapta because from the very beginning we felt truly understood. We worked together as equals and shared the same vision for the introduction and support of Microsoft 365.**



**André Picker**

Deputy Head of IT  
KZVK and VKPB

One particular highlight were the use-case workshops: together with department representatives, concrete use cases were identified and a comprehensive understanding of requirements, workflows, and interdependencies across departments was developed.

This understanding also proved essential for the accompanying workshops focused on migrating legacy SharePoint structures into the new Teams environment. The change team was able to integrate departmental perspectives in a targeted way, make dependencies visible, and support the transition into the new environment with precision. Throughout the project, management provided strong and effective sponsorship. The core message to employees was clear: the transformation would happen step by step – and everyone could progress at their own pace. “We put a great deal of thought into the rollout and consciously decided to bring in professional support. Change & adoption was a key topic for us to ensure that all colleagues were taken along on the journey to KVK365,” says André Picker. Through approachable communication, transparent planning, and the opportunity to learn at an individual pace, the foundation for modern and connected collaboration was successfully established.

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