

First Data Improves Collaboration Between Staff and Customers with Unified Communications

First Data

industry:

Information Technology

country:

Australia

business challenge:

A need for a more stable, reliable and centralised communications platform to enable 1,400 across Asia Pacific to be more productive

solution:

A stable unified communications platform that offered an integrated, user-friendly approach to communication and collaboration across the region

services:

- Lotus Notes to Microsoft Exchange Server Migration Services
- Microsoft Office Communicator 2007 Deployment and Integration services

results:

- Improved communication between the company's staff and external customers
- Deployed a standard, stable email and instant messaging platform that established better communication between the company's head office and worldwide subsidiaries
- Provided real-time presence information that enables staff to see who is available and who is on a call

Executive Summary

First Data teamed with Dimension Data to **deploy an email and unified communications system** based on Microsoft® Exchange Server 2007.

The new system incorporates Microsoft® Office Communications Server 2007 with the company's existing Avaya IP telephony platform and includes instant messaging, telephony, and web, and audio and voice conferencing, which can be integrated with Microsoft Outlook and Microsoft Office platforms. As a result, First Data has improved its ability to communicate across multiple office locations and has reduced IT costs.

Client Overview

First Data provides payment systems to more than five million merchant locations worldwide. Based in the United States, the company ensures electronic payments are made quickly and securely across transaction technologies such as ATM and EFTPOS machines. It also offers fraud protection and authentication solutions, electronic cheque and acceptance services, internet and mobile commerce systems. First Data generated US\$9 billion in annual revenue globally in 2008.

Business Challenge

First Data had a large, complex, ageing and distributed Lotus Notes email system across multiple Asia-Pacific locations that had become unreliable. With more than 1,400 employees relying on email throughout the region, the company wanted a more stable and centralised communications platform. "We wanted to move away from the existing system because it was underperforming and the support for it had also run out," says James Law, End User Support at First Data. "We also needed better communication functionality.

First Data's IT team received high volumes of help desk calls due to the system's ongoing performance issues. In addition, maintaining many isolated servers across the region was cumbersome and meant contact lists were not centralised. First Data wanted a solution that simplified its email and improved internal communications between its numerous offices, including the head office in the United States.

Solution Delivered

First Data engaged Dimension Data to migrate the company's email system from Lotus, Notes and deploy Microsoft Exchange Server 2007 and Microsoft Office Communicator 2007.

"We knew that with Microsoft Exchange and Microsoft Outlook, First Data would have greater control over its email communication,"

said **Paul Barr, Solutions Architect, Dimension Data.**

"By moving to a centralised, highly available email system, the company could ensure different offices were using the same addresses and mail formatting. This would improve communication and make it easier for the IT team to maintain the system."

“But Dimension Data was so **diligent** in this process and really **understood our business needs.**”

To better connect its Australian and international offices, First Data installed Microsoft Office Communicator 2007. The implementation included a single directory, instant messaging, voice conferencing and IP telephony, integrated with the Microsoft Outlook 2007 and Microsoft Office 2007 programs. These tools would allow staff to collaborate with each other at any time.

How We Delivered

Dimension Data carried out a detailed system review to begin the transition to the new platform. The team examined the existing email structure and drafted a plan for moving to a more simplified and organised system. In addition, the platform had to be implemented with minimal impact to First Data's day-to-day business.

Dimension Data focused on merging the disparate email servers onto a consolidated Microsoft Exchange 2007 topology, evenly distributed across First Data's two data centres. The end-state architecture provided server, database and site level redundancy. The migration process was simplified by Dimension Data's preparation and workshops held with the First Data team.

“After a series of initial workshops, we created a design and migration plan, which blueprinted the end state architecture as well as how the new solution would be delivered,” said Barr. “This was a real team effort,”

says **Leigh Arteaga, Director, Solutions Development, First Data.**

“I wanted that engagement between our teams because I knew the Dimension Data consultants could share their knowledge and experience with my staff, which they willingly did.”

The implementation also presented some unique challenges with language and time zone differences among various First Data offices.

“There were some initial challenges because we had a great deal of data to transfer across multiple country sites,” said Law. “But Dimension Data was so diligent in this process and really understood our business needs.”

One of the biggest issues Dimension Data encountered was successfully replicating the Lotus Notes mailboxes back to a temporary Lotus Notes server in Sydney so as to support the migration by ensuring a stable Lotus Notes platform and to avoid migrating data across the wide area network. First Data conducted volunteer training sessions in conjunction with the migration. The new system was popular and created an opportunity for staff to learn together. The project took three months and employees were using the new system by March 2009.

“It was quite a challenging project that required thorough planning and preparation,” said Barr. “There were many isolated servers that needed consolidation as well as stringent security considerations. “But instead of travelling to each country, we did everything remotely. We worked with First Data to remediate and synchronise the Lotus Notes mail data centrally so that it could then be quickly migrated across to the new Microsoft Exchange Server platform. To help with the chosen migration approach, Notes mail data was migrated across in multiple stages. As a result, the majority of end users were seamlessly cut across to the new platform over a single weekend with great success. Business disruption was nominal.”

Dimension Data also assisted First Data in high-level planning and design of the company's own implementation of a rights management system to provide users with the ability to apply restricted permissions, encryption and authentication for email, primarily to prevent accidental leakage of sensitive financial information.

Value Derived

Microsoft Office Communications Server and Microsoft Exchange Server 2007 provided First Data with a versatile communications platform for its employees and has also improved its ability to connect with clients.

“The instant messenger tool is so valuable in those types of situations where a client is on the phone with an urgent request but the person they need is in a meeting. You can send the staff member a quick text message, which instantly appears at the bottom of their screen.”

Microsoft Exchange Server has centralised First Data's email service, with employees across the region now working on the same platform, which uses a single protocol and format. This means all emails look the same, are simple to read and attachments will always open.

The new system also ensures there are no disruptions to email and a new back-up server means even when a problem does occur, employees won't notice a disruption to their email sending and receiving. “Microsoft Outlook is a much more stable and reliable environment than what we had previously,” said Arteaga.

“Our employees are more familiar with it too because they use it at home. It's been a smooth and effective transition because of that familiarity.”

Microsoft Office Communicator System provides First Data with a real-time presence information that enables staff to see who is available and who is on a call. They can better organise their work, calls and meetings using this simple communication function.

The deployment of Microsoft Exchange has also established better communication between First Data's head office and subsidiaries worldwide, which was a key requirement of the upgrade. First Data's Sydney office has become the company's hub in Asia-Pacific and needed to take the lead on the project for the region. The new platform ensured it was connected quickly with head office and other offices around the region.

"What makes the system so great is that you can contact any staff member, locally or remotely," said Arteaga. "The IT team regularly needs to communicate with our international offices and we can overcome any language barriers and time zone differences with instant messenger. In addition, unified messaging functionality allows staff to retrieve voicemail from their inbox."

The centralised server also gives First Data a common contacts list for all employees instead of many lists across multiple locations. First Data has reduced costs by cutting help desk volumes and no longer paying consultancy fees to maintain the old system.

"We had regular system maintenance and consultancy because system failures were beyond our control," explained Law. "Since the upgrade, help desk calls have dramatically reduced. The cost savings on maintenance have been huge. "We also expect to report further cost savings when we start using video conferencing tools in the near future," said Arteaga. "If you consider the potential travel savings our company will experience once we fully utilise these tools, this was the best solution for our business."