

Leading financial institution puts its trust in Dimension Data and Microsoft Exchange

Microsoft Exchange Server 2010

industry:

Financial Services

country:

South Africa

business challenge:

Meeting financial services legislative regulations around security and privacy requirements, while supporting the bank's projected growth

solution:

Migration of the bank to its own messaging platform, leveraging its existing investment in Microsoft software

services:

- Planning, deployment and integration services for Microsoft Exchange Server 2010

results:

- Enhanced business agility through a highly reliable and consistently available messaging platform
- Facilitation of projected growth through cost effective and rapid scalability
- A simplified and self-contained infrastructure creates a more secure operating environment
- Reductions in operating costs through built-in compliancy, increased availability, increased performance and time-saving self-service features
- Enhanced user mobility via remote access to e-mail, calendars, tasks and contacts via a variety of mobile devices

Executive Summary

This client is a well-known financial services provider in South Africa, providing a **broad range of banking products and services** to the personal and corporate markets. As its product offering became more complex, it identified the need to **streamline its IT**.

Dimension Data Microsoft Solutions was able to provide the ideal solution to consolidate and simplify the organisation's messaging platform. Dimension Data Microsoft Solutions scoped, planned and executed a cross-company and cross-generation migration of close to 1000 mail boxes with full redundancy of the previous system. The end result is an optimised and comprehensive messaging platform that is reliable, secure and is robust enough to carry the bank through the extensive growth projected in the future.

Client Overview

The client is currently represented across South Africa and leverages the strengths of not just one, but two of the country's leading brands.

In addition to core Forex activities, the client has recently repositioned itself by providing the personal and corporate markets with a broader range of banking products and services. The bank offers an attractive range of retail banking investment products as well as a personal savings account at competitive interest rates. On the corporate side, the bank is extending financial assistance on an application basis to businesses in South Africa requiring short and medium term funding.

Business Challenge

The client forms part of a much larger business conglomerate. In an effort to capitalise on existing resources, the bank's mail server was hosted with another of the group's subsidiaries. The two operate as independent concerns, based on adjoining floors, making this arrangement an inexpensive stop gap for the short term. It did present several challenges.

Out of necessity, the bank's applications run 24/7 and demand maximum uptime to function effectively. With its mail server hosted externally by its sister company, the client was apprehensive about its inability manage its own uptime and availability as well as the lack of control this arrangement provided.

Security issues were a major concern. As a financial services provider, the client is governed by a number of compliance and legislative regulations in order to meet banking security and privacy requirements. The shared hosting and trust environment posed certain risks, including that of sensitive data being compromised and business continuity concerns.

The client also has a projected growth trajectory that will see the company expand by almost 50% over the next two years. This growth would only add to the pressure on the already beleaguered system. This need for scalability further motivated the switch to a self-contained server environment.

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Relationship History

The group’s organisational strategy called for a name-change and re-branding, prompting the need for the bank to migrate their Microsoft® Active® Directory infrastructure. Dimension Data has travelled the road with the client throughout its change process, aiding with the construction and adaptation of technology architecture as well as the various migrations required, keeping pace with the company’s evolution.

As concerns around uptime disruptions and compliance issues escalated, and with the existing architecture monitored by Dimension Data moving towards the end of its support agreement, the stage was set for the migration of the bank to its own messaging platform.

Dimension Data Microsoft Solutions brought a solution to the table that would alleviate many, if not all, of the client’s messaging pain points and further cement its relationship with Dimension Data.

Solution Provided

The client is primarily a Microsoft house, and the company was looking to leverage its existing investment to the best advantage. Microsoft® Exchange Server 2010 was launched mid-2009 – perfectly timed for the bank to benefit from this latest versioning and the added functionality now on offer.

This would not be a straightforward deployment. While the bank’s mailboxes were hosted on its sister company’s server, it had created its own domain, so all the associated active directories and user permissions were hosted with the bank itself. The entwined architecture would take some careful unravelling and the solution called for a cross-forest migration from the sister company’s Microsoft® Exchange Server 2003 environment to a newly created Microsoft Exchange Server 2010 environment. Every single mailbox (close to 1000 users in all) had to be recreated and migrated from the old platform, while keeping all underlying directories and permissions that were native to the bank’s portion of the platform intact. This had to be done with no mail loss and as little downtime as possible, and within the windows of time identified and planned for. The physical migration took place over a period of just hours.

This new deployment of Exchange Server 2010 is completely contained within the client’s own environment, severing all dependencies on the previous trust. It provides a fully comprehensive messaging service solution for the bank and its retail outlets. This embraces not only mail messaging from a proliferation of devices, but more productive calendaring capabilities and task management, improved mobility for employees, excellent mailbox resilience plus a number of attractive time-saving administrative features to improve productivity and drive down operating costs.

How We Delivered

Dimension Data relied heavily on its existing relationship with the client and our first-hand knowledge of the company’s operations to design, build and deploy an effective and cost-conscious solution for the client. Because of the in depth understanding of operations, Dimension Data was able to effectively scope the deployment for maximum impact and minimal disruption to the company’s operations.

Our technical expertise with both Microsoft® Exchange Server 2003 and the newly introduced Microsoft Exchange Server 2010 allowed our technical team to optimise the native Microsoft tools available. This eliminated the need for any third party products which would only have added to the cost of the once-off migration. We were able to plan the migration for minimal disruption to the client’s critical business functions. Our pre-existing Uptime Service agreement meant that Dimension Data was well aware of the organisation’s usage requirements and pain points. We were able to identify potential pitfalls to the roll out and pre-empt these through careful planning, risk mitigation procedures and open communication with our client.

We could prioritise which outlets would require special attention during the actual migration phase. Outlets like Foreign Exchange terminals at various airports could not afford any downtime since their availability is business critical in their face-to-face dealings with the customers using their kiosks. In the actual roll out, these areas were flagged as priority and were expedited to ensure that the actual migration was completed within moments and almost zero impact on their ability to engage with their customers.

Value Derived

Optimised messaging

950 people across 167 branches, including a number of Forex traders use the system. Exchange Server 2010 provides valuable messaging tools and time saving functions designed to make users more productive and collaborate better.

For example, integrated conversation views collate information across all folders, inbox, sent and deleted items into threads - so that users no longer have to hunt for the information they need. These simple, yet effective tools save the client hundreds of man hours each month.

Mission-critical reliability

Because of the patchy connectivity of the original system, the client was plagued by recurring down time and unreliable service. The new server not only provides better availability, but Exchange Server 2010 has built in tools that help minimise the impact of any failures with fast failovers, better recovery and inherent administration tools that work behind the scenes to ensure information is always accessible. This gives the financial services provider confidence in the knowledge that they will be able to deliver on their promises to their customers, as well as further improve productive levels within the company.

Tighter security for peace of mind

Maintaining the correct levels of security within the open trust environment to adhere to the strict compliance regulations had become a real area of concern. The move away from this trust to Exchange Server 2010, has substantially simplified the technology environment, making it easier to defend from a security point of view. Improved mail resilience and the ability to better preserve and discover information has also improved business continuity.

Exchange Server 2010 includes a wide range of information protection and control features. These features enable administrators to fine tune policies so that the right level of control is automatically applied to each message. 'Soft' controls automatically add alerts, disclaimers or other data to a message without affecting delivery, while other 'hard' controls can be used to guard more sensitive content by modifying, protecting or rerouting messages as required. These improved controls are critical in the banking industry's strict environment.

Great flexibility

The release from the old trust and the consolidation of information technology means a less complex environment that allows the client to utilise its IT resources to even better advantage and improves overall agility.

The bank is on track to open 11 new branches within the next 24 months. This represents around 450 new appointments joining the organisation before the end of 2011. The solution is fully scalable and has been designed to accommodate this growth and other opportunities with ease.