



Microsoft Exchange Hosted Services Customer Solution Case Study



W. J. BRADLEY COMPANY

Customer: W.J. Bradley Company

Web Site: www.wjbradley.com

Phone: (866) 575-5998

Customer Size: 100 to 5,000 employees

Country or Region: United States

Industry: Financial services—Mortgage services

Partner: USA.NET

Web Site: www.usa.net

Phone: (800) 653-0179

Customer Profile

Based in Denver, Colorado, W.J. Bradley is a privately held, independent mortgage bank that provides numerous offerings to retail customers. The company employs more than 500 people in 32 states.

Software and Services

- Microsoft Server Product Portfolio
 - Microsoft Exchange Server 2007
- Microsoft Office
 - Microsoft Office Outlook 2007
- Technology
 - Microsoft Office Outlook Mobile Access
 - Microsoft Office Outlook Web Access

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www.microsoft.com/casestudies

Mortgage Bank Gains Anytime, Anywhere Access to E-Mail with Flexible, Hosted Offering

“I can’t even begin to calculate what it would cost to provide for 99.9 percent availability. By going with a hosted solution from USA.NET, we’ve been able to reduce costs and gain the benefit of a business-continuity infrastructure.”

Howard Michalski, Managing Director, W.J. Bradley Company

W.J. Bradley Company, a privately held mortgage firm with more than 500 employees, engaged USA.NET to provide a hosted e-mail solution built on Microsoft® Exchange Server 2007. Designed on a software-plus-services model, the highly customizable solution gives W.J. Bradley the ability to quickly integrate new branch offices, provide anytime, anywhere access to e-mail, and pay only for the functionality that each employee uses.

Business Needs

As a mortgage bank that provides real estate financing to people in 32 states, W.J. Bradley Company needs to give employees secure access to e-mail at any time, regardless of where they are located. If e-mail is unavailable, productivity suffers and the processing of loans can be jeopardized. Before 2007, the company managed its own e-mail solution, which was built on Microsoft® Exchange Server 2003. Ongoing acquisitions led to steady growth, and the company’s three full-time IT employees found it challenging to manage an increasing number of e-mail issues including business continuity and the

integration of disparate mobile devices.

To help ease the burden on IT, W.J. Bradley decided to outsource e-mail. “I could run an electricity generator out in the parking lot to power this building, but that’s why we have the electric company,” explains Pete McGill, Vice President of Information Technology at W.J. Bradley. “I look at e-mail as a similar type of utility. To maintain a highly reliable, highly available, redundant, fault-tolerant, and recoverable e-mail system for 500 employees is really cost-prohibitive.”

Initially, W.J. Bradley tried several hosted

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You run your business.
We’ll run your email.®

Microsoft®

solutions, including Gmail from Google, that used POP or IMAP to deliver e-mail functionality. However, those solutions created more problems. “Our users almost universally preferred to use Outlook® as their e-mail client, and getting everything to work properly with e-mail servers that weren’t running Exchange Server presented lots of challenges—especially with mobile devices,” says Howard Michalski, Managing Director at W.J. Bradley. “Employees had difficulties with calendars and e-mail folders. Administrators and end users trying to get the services to work properly faced a steep learning curve, and there were a lot of help-desk calls. In the end, the interoperability of these services with the preferred client, Outlook, was difficult to maintain and not all that reliable.”

Solution

Based on its past experience, W.J. Bradley decided to find a hosted solution built on Microsoft Exchange Server 2007. “The combination of Outlook and Exchange Server gives a superior user experience that’s hard to beat,” notes McGill. In May 2008, IT personnel engaged Microsoft Gold Certified Provider USA.NET. Unlike the other e-mail vendors that W.J. Bradley had tried, USA.NET based its comprehensive, multitier offering on the software-plus-services model so that services are easy to use, simple to integrate, and customizable for every employee.

Administrators set up an account for each employee that includes only the services that the employee needs. For example, while some people only access e-mail from work, others may access e-mail from a portable computer, a home workstation, a Windows Mobile® device, or an iPhone. “The team at W.J. Bradley understands the dynamics between business requirements and user experience,” notes Steve O’Brien, Vice President of Messaging at USA.NET. “Our multitiered

service structure allows us to customize a solution to meet the messaging, collaboration, and wireless needs of each user.”

USA.NET worked with W.J. Bradley to design an initial solution that provides e-mail and enhanced services—including archiving, protection against Internet-based threats, mobile access, and a guarantee of 99.9 percent availability—to 70 executives in two branch offices. The implementation took less than 24 hours. “We were able to do the migration with almost no disruption to end users,” explains McGill. “Everything went very smoothly. We’re now almost finished rolling out the solution to the rest of our branches.”

The new solution gives employees access to all of their new and old e-mail messages and folders. To access e-mail from a workstation, employees use the Microsoft Office Outlook 2007 messaging and collaboration client. To access e-mail from the Web or a mobile device, employees use Microsoft Office Outlook Web Access or Microsoft Office Outlook Mobile Access. Regardless of how employees access their account, they have only one inbox and one shared calendar.

Benefits

By taking advantage of a software-plus-services offering built on Microsoft Exchange Server, W.J. Bradley has realized numerous benefits.

- **Reduced costs and increased reliability.** E-mail costs less because the company pays only for the services that employees use. In addition, IT personnel do not have to spend time or money to ensure that e-mail is always available. “I can’t even begin to calculate what it would cost to provide for 99.9 percent availability,” says McGill. “By going with a hosted solution

from USA.NET, we’ve been able to reduce costs and gain the benefit of a business-continuity infrastructure.”

- **Reduced help-desk calls by more than 50 percent.** Employees find the new e-mail solution to be easier to use than other hosted offerings. “We’ve had more than a 50 percent reduction in what I call the ‘drive-by’ help-desk requests,” McGill notes. “We no longer get urgent phone calls from users who are extremely frustrated.”
- **Eliminated complexity.** Administrators are more productive because they no longer need to set up, administer, and manage an e-mail solution. “Our core competency is not running an e-mail system and the associated system administration functions,” says McGill. “Being relieved of these functions allows us to ensure that our business goals are in direct alignment with our technology.”
- **Provided for greater flexibility and control.** W.J. Bradley can easily integrate new branch offices, employees, and technologies into its e-mail solution without extra investment in hardware, software, and administrative personnel. “Bringing a new branch office into our e-mail system was once considered heavy lifting for us,” Michalski concludes. “Today, it is routine. We can better manage expenses, and plan for and manage acquisitions. As our needs expand or contract, we have a solution that we can adapt accordingly.”