

Financial Services Business Transforms Efficiency Of Mobile Working Through Unified Communications

FIRST RATE EXCHANGE SERVICES

Country

UK

Industry

Finance

Challenge

To enable a growing mobile workforce to stay in touch and work more effectively when on the move.

Solution

In a Nortel and Microsoft Innovative Communications Alliance project, the Nortel Communication Server 1000 was integrated with the Microsoft® Office Communications Server 2007 and Microsoft® Exchange Server 2007. The Microsoft Office Communicator 2007 application delivers a whole range of presence tools, including enterprise-class instant messaging (IM) and integration with Microsoft Office 2007 applications. The whole architecture is managed using the Nortel Communication Server 1000 Telephony Manager.

Results

- **Rapid adoption of Unified Communications**, as presence, Instant Messaging and click-to-call tools are very intuitive
- **Greater productivity of mobile staff**, through access to IM and other presence-enabled tools
- **A single phone number for each person**, irrespective of device
- **A scalable platform** that can be extended to new devices



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Adam Jacobs, IT Services Delivery Manager, First Rate

First Rate is the UK’s leading provider of foreign currency services supplying over 11,500 retail outlets including the Post Office®. It is also the UK’s biggest foreign currency notes supplier, and Europe’s major provider of traveller’s cheques. First Rate was established as a joint venture between the Post Office and Bank of Ireland Group in 2002, and sources currency through its associate business unit Bank of Ireland First Currency Services.





Photograph by kind permission of First Rate Exchange Services

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Delivery Manager, First Rate

THE SCENARIO

The vast majority of businesses have staff that spend time on the road. And for these people, mobile communications are critical. Sales teams, IT support, account managers... all of them need a way to stay connected to the office and each other as they travel.

However, when more staff are working remotely than they are in the office, there comes a point when mobile phones and PDAs are no longer enough – as First Rate recently realized.

As the UK’s leading provider of foreign currency services, First Rate handles orders to over 11,500 retail locations every day. Many of these white-labeled services are fully outsourced and delivered by experienced managers who run the projects on their clients’ behalf. But this means these individuals – also including IT teams and area managers – can rarely be found in First Rate’s offices.

Unsurprisingly, this started to make it challenging for First Rate’s staff to stay in touch. Calls and messages were often missed, while the cost of constant mobile phone use was rapidly increasing.

To solve this problem, First Rate’s Adam Jacobs had a good idea. Responsible for IT services delivery at First Rate, he is also a keynote speaker for Microsoft – and fully aware of the Innovative Communications Alliance between Microsoft and Nortel. He could see that Microsoft software, coupled with an upgrade of First Rate’s existing Nortel switch, would enable the business to take advantage of Unified Communications. “Our people work in such a variety of ways, but the common denominator is that they are mobile. By taking advantage of Unified Communications, location would no longer be an issue, and our staff could stay in touch with each other freely and much more cost-effectively,” he explains.

“I’d seen the launch of Microsoft Office Communication Server 2007 (OCS), and I knew about the strategic alliance between Nortel and Microsoft. We’d been working with Nortel and Microsoft for some time, so I was very keen to find out how we could implement Unified Communications.”

To discuss this, Adam approached Microsoft.

THE SOLUTION

Microsoft demonstrated OCS to First Rate’s IT team. Adam was impressed with the results. “I decided to approach our Nortel implementation partner to help set up a pilot of the Unified Communications system within the network team. That way, we could make sure everything was working well before we deployed it across the wider business,” he adds.

Microsoft, Nortel and its implementation partner designed a Unified Communications solution based around the Nortel Communication Server 1000 platform. Upgraded from First Rate’s existing core switch through a simple software installation, this leading IP PBX is seamlessly attached to the Microsoft Exchange Server 2007 and the Microsoft Office Communications Server to unify voice, data and multimedia communications. The process was extremely straightforward, and required no additional middleware between Nortel and Microsoft to achieve full integration.

First Rate also installed the Microsoft Office Communicator 2007 application. This delivers presence awareness, software-powered voice capabilities, enterprise-class instant messaging (IM), multi-party audio, video and desktop sharing, and integration with Microsoft Office 2007 applications, enabling users to connect and collaborate from any location that has Internet connectivity.

Finally, the whole architecture is managed using the Nortel Communication Server 1000 Telephony Manager.

Nortel and Microsoft were heavily involved in getting the pilot up and running, and it proved extremely successful. First Rate subsequently carried out a phased launch of Unified Communications to 230 people across the business. “The rollout was pretty big, but thanks to the successful pilot and some thorough planning on our part, we had virtually no issues whatsoever,” confirms Adam.

THE RESULTS

First Rate’s Unified Communications solution has now been up and running for several months – but the company started to see the benefits straight away. “The first thing we wanted to do was to train people on the tools. So we set up a series of training workshops,” explains Adam. “However, I soon realized that training wasn’t really needed. The Nortel Microsoft Unified Communications tools are so intuitive that our staff had already played around with them a lot, and were using them confidently without any help.”

According to Adam, the presence and Instant Messaging (IM) tools rapidly proved to be a big hit. Colleagues in the office and on the road can see each other’s availability with ease, and simply send an instant message rather than making costly mobile phone calls. “IM is really useful to get hold of senior executives that are regularly in meetings. And our IT guys use it quite a lot when at remote sites, to tell their colleagues when someone has logged a helpdesk ticket. Virtually everyone in the business has it and is using it in some way.”

Indeed, the improvement in mobility has been dramatic. In addition to presence-enabled tools, staff can now make and receive calls via the same, single telephone number, with calls routed to whichever device they’re using. “This could be a mobile phone, a remote desk phone or a USB phone plugged into their laptop,” explains Adam.

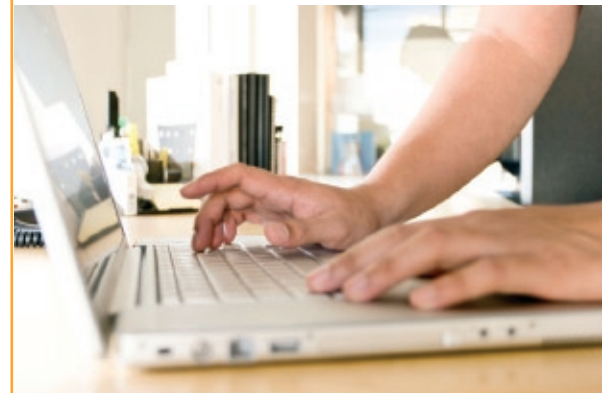
This ‘plug-and-go’ functionality is also available in First Rate’s main city office. This has been turned into a hot-desking site, where staff can access their office profile and the same suite of Unified Communications tools via their laptops.

Meanwhile, the ability to click-to-call is saving quite a lot of time. Staff can initiate calls through Microsoft Outlook – simply by clicking a person’s name – instead of having to look up names and numbers on directories or websites.

In the near future, First Rate is considering extending its Unified Communications technology to BlackBerry devices. As Adam concludes: “We can get much more out of the Nortel and Microsoft platform. The beauty of the technology is it can support a vast range of activities.”

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*Adam Jacobs, IT Services
Delivery Manager, First Rate*



SOLUTION AT A GLANCE

- Microsoft Exchange Server 2007
- Microsoft Office Communications Server 2007
- Microsoft Office Communicator 2007
- Nortel Communication Server 1000
- Nortel Communication Server 1000 Telephony Manager

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ABOUT NORTEL

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