# Unified Messaging Saves Pension Fund Employees Hundreds of Hours a Year

> "We are improving our employees' working environment and strengthening our reputation as a forward-thinking company. We are also optimizing our business operations."
>
> Hans de Harde, ICT Architect, PGGM

## Overview

**Country or Region:** The Netherlands
**Industry:** Financial services

## Customer Profile

PGGM administers the compulsory pension programs for the healthcare and social work sector of the Dutch economy. With more than 1,000 employees, it is one of the largest pension funds in the Netherlands.

## Business Situation

PGGM has 150 employees who work remotely and many who travel long distances to work each day. The company recognized that it could raise productivity by consolidating its communications infrastructure.

## Solution

PGGM took part in the Rapid Deployment Program for Microsoft® Exchange Server 2007 Unified Messaging. A subset of employees now has remote e-mail and voice mail access through a single device.

## Benefits

- Improves mobile productivity
- Increases time for value-added work
- Enhances collaboration
- Reduces impact of delays
- Reinforces reputation as a thought-leader

PGGM is the second largest pension fund in the Netherlands, providing pension packages for 2 million former and current employees working in the healthcare sector. Many of its 1,000 employees spend several hours each week commuting by car. The company wanted to make e-mail and voice mail messages available to these employees while they were traveling. It has achieved this by deploying Microsoft® Exchange Server 2007 Unified Messaging. With Microsoft Office Outlook® Voice Access, and hands-free mobile devices, employees now use simple voice prompts to access e-mail messages that are read back by the new software. They can also respond with voice mail messages, answer meeting requests, and listen to new appointments. The integration of voice and e-mail took just two days. Employees will save hundreds of hours a year and improve their work-life balance.

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## Situation

PGGM is the second largest pension fund in the Netherlands, providing 2 million former and current employees in the healthcare and social work sector with comprehensive pension packages. The fund invests worldwide in equities, fixed-interest securities, real estate, private equity, and commodities with a total pension capital of more than €80 billion (U.S.$107 billion).

Hans de Harde, ICT Architect, PGGM, says, "We work with our IT partners to study the potential of new technology as soon as it becomes available. For example, in 2001 we started replacing our mainframe-based architecture with one based on Microsoft® technology, which simplified our IT infrastructure and reduced total cost of ownership. Embracing new technology also reinforces our reputation as an employer that invests in its people."

PGGM wants especially to give employees the latest messaging applications. E-mail plays a critical role, helping them work productively and improve their work-life balance. The main application is Microsoft Office Outlook® 2003 messaging and collaboration client, and the back-end is based on Microsoft Exchange Server 2003 Enterprise Edition in a non-clustered environment.

In addition, all mobile employees have laptops with either wireless connections or Internet access via Windows Mobile®. And fifty of the employees have smartphones running Windows Mobile version 5.0.

Of the company's 1,000 employees, 150 spend most of their time working away from the office. These employees work for the Investment department and are responsible for managing the company's external assets. This means that they regularly drive to visit customers across the Netherlands and abroad.

Many other employees spend two or more hours each day driving to and from work. The communications infrastructure served office-based employees and mobile laptop users well, but employees couldn't check e-mails while driving.

"A three-hour commute to work is not unusual. This time could be spent productively if you have the right tools to communicate with colleagues and access information," says de Harde.

It wasn't just a case of using travel time more productively. If these employees were delayed in traffic and wanted to postpone a meeting, they had to try to call the office and ask someone to send an e-mail message or call all the other attendees individually.

Says de Harde: "They couldn't understand why the latest mobile and e-mail technology made it so complicated to make these simple arrangements. I understood their frustration, and as soon as Microsoft Exchange Server 2007 was announced, I realized that it had the potential to solve this problem."

## Solution

With its progressive approach to technology, and a strong relationship with Microsoft, PGGM was keen to deploy Exchange Server 2007 as soon as it became available.

In February 2007, the IT team at PGGM used the Microsoft Exchange Server Best Practices Analyzer Tool to check that the company infrastructure was ready to run Exchange Server 2007 Enterprise Edition.

Once this task was completed, de Harde and his team migrated a subset of user mailboxes, as well as those of the entire Board of Directors, to Microsoft Exchange Server 2007. Approximately 200 employees are now using unified messaging.

The IT team was impressed by how much easier it is to incorporate new employees in the Active Directory® service. This is achieved through the Exchange Management Console or a Windows® PowerShell™ command line interface script. "The console uses a self-explanatory graphical interface. We rolled out the system at literally the click of a button," says de Harde.

One of the most significant advances with Exchange Server 2007 is the integration of voice messaging with e-mail in the user's inbox. To integrate its existing circuit-switched private branch exchange (PBX) system with Exchange Server 2007 Unified Messaging, de Harde's team worked with a Microsoft Gold Certified Partner NEC Philips, a unified messaging specialist. This integration was accomplished in just two days.

Together they incorporated a Dialogic PBX-IP Media Gateway into the existing system. This gateway allows the traditional PBX to interoperate with Exchange Server 2007 as well as Microsoft Office Communications Server 2007, and it can easily be expanded for more users—without the need to purchase further gateways.

PGGM selected individuals for the initial subset based on their potential to benefit from the new unified messaging features delivered through the following applications:

■ Microsoft Office Outlook 2007: Sophisticated e-mail access from laptops or desktop computers connected to the PGGM network. Includes a new Scheduling Assistant that lets users more easily and quickly schedule meetings with colleagues.

■ Microsoft Office Outlook Web Access 2007: Includes vastly improved search as well as new security and compliance capabilities. It also includes WebReady Document Viewing, which converts documents into HTML.

■ Microsoft Exchange Server ActiveSync®: Pushes e-mail messages, voice mail, fax, calendar, contacts, and tasks to a mobile device as soon as they arrive at the server.

■ Outlook Voice Access: Provides access to voice mail messages but also to e-mail, calendar, personal contacts, and the entire company directory.

■ Exchange Server Unified Messaging: Plays e-mail messages using text-to-speech. Users can manipulate messages using voice recognition. Meetings can be accepted, declined, postponed, or canceled over the phone.

Bearing in mind the feedback from employees spending several hours a day driving to work or visiting clients, de Harde especially wanted to take advantage of Outlook Voice Access. Many of those in the trial program can now use their existing mobile devices, in hands-free mode, to listen to e-mail messages, send replies, and manage meetings.

## Benefits

Employees participating in the RDP can now use their driving time productively to respond to e-mail messages, prepare for meetings and work tasks, and collaborate with colleagues. De Harde is so impressed by the feedback from the trial group that he hopes to migrate 100 percent of the PGGM work force by 2008.

### Improves Mobile Productivity

Employees who drive 100 kilometers every day can gain up to three hours. "I spend a lot of my travel time sitting in traffic jams," says de Harde. "Now, I can use this time to prepare for the day ahead. The text-to-voice

technology reads out my e-mail messages and I use simple voice prompts to respond."

With Outlook Voice Access, employees can also listen and reply to voice mail messages. This offers a simple, safe solution to drivers, who can't type e-mail responses. Instead, drivers dictate a voice mail message that is attached to an e-mail message as a sound file and sent to the intended recipient. They have greater reassurance that they won't miss important messages from their colleagues in the office, and they can reply quickly—all through the same device.

Users can also delete e-mail messages and save appointments remotely, so more office time is free for value-added work. Productive use of commuting time also encourages a better work-life balance, because employees can do most of their start-of-day or end-of-day administration while traveling.

"Employees can access voice and e-mail messages through a single channel," says de Harde. "All they need is their PIN and one telephone number. Also, it's much easier for them to let their colleagues know when they are delayed or to send an important message."

De Harde is also impressed by how easy it is to manage the new technology. There was no need to recruit additional employees or spend time training existing team members. In fact, it has had very little effect on IT resources except for the short amount of time required to implement the technology at the very start of the project.

### Enhances Collaboration through Streamlined Communication
PGGM employees who use Exchange Server 2007 Unified Messaging can also view and manage their calendars. They can accept or decline meeting requests and notify other participants of late arrival, or clear calendars if they need to free up the time.

In the past, when managers were running late for a meeting, they had to leave a message with the office and hope that it was passed on to employees by telephone or a new meeting request. This uncertainty no longer exists. Says De Harde: "With unified messaging, our employees can dial the Exchange Server from their cars and give a verbal command prompting the server to send a new meeting request to all attendees."

These faster response times encourage closer collaboration between employees and their customers, clients, and colleagues. Because all message types are consolidated, and access is not limited by Internet connectivity, ideas can be exchanged effectively, meetings arranged easily, and issues resolved more quickly. "Employees can begin the collaborative process before they arrive at the office in the morning," de Harde says.

### Reinforces Reputation as a Thought Leader
PGGM participation in the unified messaging RDP supports its position as a thought leader in the uptake of emerging technologies. "We are improving our employees' working environment and strengthening our reputation as a forward-thinking company. We are also optimizing our business operations."

### Cost-Effective Deployment Gives Rapid Return on Investment
The cost of implementing Exchange Server 2007 Unified Messaging was limited to hardware and the company's own labor costs during deployment. "Using the Dialogic PBX-IP Media Gateway, we integrated our voice and e-mail messaging through our existing PBX system at minimal cost. The gateway was inexpensive, and we can expand the current

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www.pggm.nl

integration to any number of mailboxes without buying additional gateways. We estimate that we will have return on our investment within 6–12 months," says de Harde.

## Software and Services

- Microsoft Server Product Portfolio
  - Microsoft Exchange Server 2007 Enterprise Edition
  - Microsoft Exchange Server 2003 Enterprise Edition
- Microsoft Office
  - Microsoft Office Outlook 2007
- Technologies
  - Active Directory
  - Microsoft Exchange Server ActiveSync
  - Microsoft Office Outlook Web Access
- Hardware
  - Dialogic 2000 Media Gateway

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