

## Migrating from Lotus Notes to Microsoft Exchange



### Client

Northumbrian Water Limited serves a population of 2.6 million in the North East of England with Water and Sewerage Services and 1.8 million in the South East of England where it provides water services trading as Essex and Suffolk Water.

### Goals

- ◆ Better understand the requirements of 3,000 email users
- ◆ Deploy an email system to meet these needs, improve system performance and reduce costs
- ◆ Ensure business continuity for the email system in the event of a server failure or major disaster

### Charteris' Role

- ◆ Conduct a user requirement and technical survey to verify the suitability of Microsoft Outlook
- ◆ Design, install and test the new system, running on Microsoft Exchange 2007
- ◆ Transfer knowledge and skills to the client's in-house team

### Results

- ◆ Estimated savings of £100,000 per year, from lower licensing and maintenance costs
- ◆ A high performance email system that meets the needs of users, delivered on time and on budget
- ◆ Automatic fail-over to a secondary data centre in the event of a system failure at the headquarters

**As a utility provider, Northumbrian Water Limited (NWL) has an obligation to ensure that it can continue to deliver services to customers, given any eventuality. The Lotus Notes email system was critical for its business, but offered poor reliability, was expensive to maintain and couldn't deliver the functionality that users wanted. Charteris designed and installed a new email system using Microsoft Outlook and Microsoft Exchange Server 2007. This modern system meets the needs of users and provides a critical fail-over capability for the business. Now, if a disaster or IT failure occurs at head office, email services are protected and employees can carry on working.**

NWL had been using a Lotus Notes email system for many years. However, the versions installed across the business were approaching eight years old and didn't work as well as they should. The system also had mailbox limits, which were unpopular with users, and didn't support the corporate archiving system.

"Our old system took a lot of maintenance and didn't deliver all of the capabilities that our users wanted any more," says Ian Sutherland, a project manager within NWL's Investment Delivery department. "We either had to upgrade to the latest Lotus Notes product or find something else."

As email is such a vital system to the business, NWL decided to ask a firm of

outside consultants to conduct an audit of its email requirements and help it determine the best option. "We have business analysts in house, but we felt it was important to engage a team with a detailed understanding of email systems," Sutherland says.

NWL used the Achilles procurement system to draw up a shortlist of consulting firms and selected Charteris following a competitive tender process. "Charteris proved that it had the skills we were looking for," recalls Sutherland. "The firm ticked all our boxes and talked with confidence and real world knowledge. The consultants could demonstrate that they had been there and done it all before - and that's important."



“The project went live on time and on budget. The Charteris consultants are very professional, knowledgeable and easy to work with.”

**Ian Sutherland,**  
Project Manager,  
Investment Delivery,  
Northumbrian Water Limited



### Thorough preparation

After considering a number of different email solutions, including outsourcing, NWL favoured the deployment of an email system based on Microsoft Outlook and Exchange Server 2007. The business had found that it could access Microsoft Outlook licences through its existing Microsoft licence agreement, at minimal additional cost.

Charteris therefore conducted a comprehensive technical and user requirements study, to assess fully whether Microsoft Outlook would meet the needs of the business' 3,000 email users. The consultants talked with people from all departments, reviewed the company's existing technical environment and identified potential deployment issues and opportunities.

One of the requirements of the business was an email system that could instantly switch from one data centre to another, to provide seamless service in the event of a failure or disaster at one site. Charteris was able to advise NWL that it could achieve this goal by using Microsoft Outlook on its Microsoft Exchange 2007 platform.

With the preparation work completed, NWL next went out to tender for a firm of consultants to help with the implementation of the chosen solution. Again, the company followed a formal tender process - and again, Charteris came out on top.

Charteris worked alongside the company's server team to design, install and test the new email system. The consultants wrote email procedures to assist the team with maintenance and passed on a lot of knowledge. “The Charteris consultants worked very well with us,” says Sutherland. “Everything they did, they did in conjunction with our team, so that we would know what to do in the future.”

### Live on time and on budget

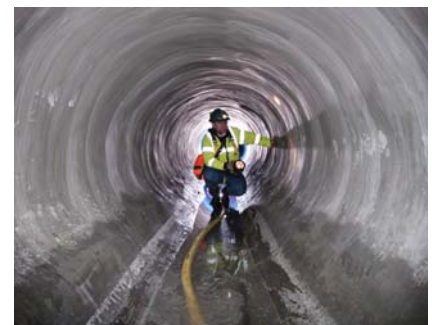
Charteris oversaw a pilot programme with 200 users and then handed the project over to NWL to roll the solution out to all 3,000 users. Sutherland says: “The project went live on time and on budget. The Charteris consultants are very professional, knowledgeable and easy to work with. If you need anything, they'll sort it out.”

The main benefit is the reduced total cost of ownership of the new email system. NWL estimates that it will save £100,000 a year from reduced licensing and maintenance costs.

The business also now has a fully redundant and resilient email system that operates over two separate data centres. “As a utility, it is very important for us to be able to provide business continuity in any situation,” explains Sutherland.

“Recently, one of our servers decided to reboot itself for no apparent reason. The email system just failed over to the other site, and no one even noticed, so it definitely works!”

User feedback has been very positive too. Employees now have an integrated Office and email system with single sign-on, shared dictionaries and the ability to email from within documents, for example. Sutherland sums up by saying: “We now have a modern email client that is light years away from what we had before. The whole experience has been very positive.”



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**Business specialists who speak IT**  
**IT experts who think business**



### About Charteris

Charteris delivers greater customer focus and business efficiency through seamless business and IT consulting. Our unique blend of 'business specialists who speak IT' and IT experts who think business' ensures that clients receive seamless solutions that deliver competitive edge.

Leading public and private sector organisations draw on our deep experience to help them improve performance and reduce costs. Our services include **Customer Centric Business Change**, **Microsoft Dynamics** solutions and other advanced solutions based on the full spectrum of **Microsoft Technologies** and associated technologies.

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