

## Case Study Highlights

**Migrated from:** IBM/Lotus Notes

**Migrated to:** Microsoft Exchange

**Country:** International

**Industry:** Banking

### Client Profile

As one of the world's largest banking and financial services organizations, this global powerhouse provides a wide range of banking and wealth management services to many millions of customers through its network of over 6,000 offices and 72 countries. Binary Tree's role in this client's company-wide transformation initiative involves migrating almost 300,000 users over a period of approximately 18 months.

### Business Situation

As part of a corporate directive to enable business units to work together more closely, this bank— one of the largest IBM/Lotus Domino customers in the world— selected Binary Tree as its migration technology-of-choice during the pilot stage, as well as throughout the entire multi-phased implementation.

### Solution Summary

CMT for Coexistence with ZAPP

CMT for Exchange

### Benefits

- The client's user experience was a priority
- Binary Tree provided executive support throughout the project
- A long-term approach was taken to build the right solution
- Extreme flexibility and customization met client requirements
- The project resulted in a secure, customized solution that performed as promised

## Top Tier Global Financial Services Company Banks on Binary Tree as Its Trusted Adviser

*This client's IT and messaging teams were given a directive to update the company's messaging platform to Microsoft Exchange in order to improve communications and collaboration among its hundreds of thousands of employees throughout 70 countries. The primary objectives were coexistence and a positive, seamless user experience transitioning between the old and new platforms—no small task for a company of this size and geographic reach.*

### Project Overview

Binary Tree was introduced to the client as a migration solutions expert early on for an 18-month long pilot project. This stage involved migrating 1,000 IT department users to the Microsoft Exchange platform. More importantly, it served as a method of determining what level customization was desired, as well as how flexible Binary Tree would be in working with the client.

During the pilot, Binary Tree had the opportunity to prove the integrity of its software and gain the confidence of the client's technology and messaging leadership teams around the globe. During the course of this initial stage, the client made many requests to mold Binary Tree's software to their requirements. As a result, Binary Tree effectively customized its products to perform as requested during the phased implementation.

### Selection Process

After the pilot was completed, the bank prepared an RFP inviting several top systems integrators to bid on the project—the objective being to ascertain who could offer the best production migration experience. Although Binary Tree was already pre-selected as the technology platform for coexistence and migration, it still had to work collaboratively with the finalists to help create a solid response plan.

The RFP was really about who would perform the end-to-end migration – including planning and execution. If any particular supplier had proprietary technologies or skill sets that contributed to that objective, they would likely win the bid.

### Earning Trust Takes Time

*From the very beginning, Binary Tree made it a priority to build trust with the client—from its technical teams, to support, to sales and delivery—all the way up through the executive ranks. Everyone that either worked for or represented Binary Tree earned a high level of credibility every step along the way.*

*Even when there were misunderstandings or if something could not be programmed exactly as requested, Binary Tree had those difficult conversations and owned the solution. As a result, the bank knew that Binary Tree was fully committed to its business and willing to exceed expectations, in order to provide the ultimate user experience.*

### Value-Added Technologies Provided by the Systems Integrator

The selected systems integrator had two such technologies. One was a SaaS training product that served as a desktop mentor to the many users who were unfamiliar with Microsoft Outlook. In addition, the systems integrator was able to deliver this service via in the bank's most popular languages (including two forms of Chinese). The second technology was designed to identify power users—typically executive or personal assistants who manage multiple calendars. These are the unsung heroes who book rooms, get people on planes, schedule video conferencing, and perform other functions that help make the bank run smoothly. These power users were given high priority and special treatment to ensure the best user experience possible.

### Customization Benefits 'On the Fly'

The migration deployment itself was heavily customized around security and access due to the nature of the business and vast geographic reach. On the coexistence side, one requirement around encryption involved transitioning to the Microsoft Exchange environment. The client requested what Binary Tree's calls 'on the fly' encryption and decryption, a feature designed to protect email privacy regardless of origin or destination.

Specifically, this feature detects IBM/Lotus Domino encrypted emails and decrypts them 'on the fly,' so email messages can be delivered to Microsoft Exchange and remain private. Conversely, emails marked as 'private' on the Microsoft Exchange side can be automatically encrypted on the Domino side. While this feature is valuable to any organization moving from a legacy IBM/Lotus Domino platform to Microsoft Exchange/Office 365, it is crucial to financial, healthcare, government, and other industries where privacy is under increased scrutiny.

Binary Tree is the only enterprise migration company to offer this advanced 'on the fly' capability, and CMT for Coexistence is the only solution with the ability to encrypt emails directly from mobile devices. As a benefit to that development commitment, this functionality is now available to all Binary Tree clients.

In addition, other security and access features were customized to protect the mail files from unauthorized access during the migration. Because the bank is regulated, they needed to have complete control as to who had access to that data and Binary Tree delivered.

**From the perspective of a multinational financial institution, Binary Tree was 'on the money'. We embraced our ability to be very flexible to the client's requirements. We took calculated risks. And as a result, we gave them the best user experience possible—one that we are sincerely proud of.**

**Binary Tree Technical and Leadership Teams**

For more information about Binary Tree, visit us at [www.binarytree.com](http://www.binarytree.com).