



Financial-Software Leader Credits Productivity Boost, Reduced IT Costs to 2007 Software

Overview

Country or Region: United States
Industry: Manufacturing—High tech

Customer Profile

Jack Henry & Associates, Inc. (JHA) is a Missouri-based company that produces software and services for small and mid-size banking and credit union customers across the United States. Its revenue in fiscal year 2007 was U.S.\$668 million.

Business Situation

JHA wanted a more efficient means of document production and employee collaboration, a more cost-effective approach to IT, and a way of demonstrating its on-going technology leadership to customers.

Solution

JHA installed the 2007 Microsoft® Office system across its organization in two rapid deployments.

Benefits

- Documents produced faster
- Stronger collaboration for easier customer communications
- Considerable IT savings
- Simplified deployment

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Brad Hawkins, Manager of Networks & Devices, Jack Henry & Associates

Jack Henry & Associates, Inc. (JHA), a leading provider of software and services to banks and credit unions, has long depended on Microsoft® Office Word, Office Excel®, and Office PowerPoint® to produce timely and effective marketing, sales, and support documents. Seeking to further streamline document production, strengthen collaboration, and reduce IT costs, JHA has provided the 2007 Microsoft Office system to more than 3,700 users throughout the company in a two-phase deployment. With the 2007 Office system, JHA professionals are creating powerful business and technical documents in less time than before and enjoying enhanced collaboration both internally and with customers. In addition, JHA is saving in hardware storage and networking costs and is better able to demonstrate its technology leadership to customers.

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Situation

Founded in 1976 and headquartered in Monett, Missouri, Jack Henry & Associates, Inc. (JHA) is a leading provider of core software systems and related applications for banks and credit unions. Its technology solutions are marketed and supported through three primary brands: Jack Henry Banking™ supports banks ranging from de novo to mid-tier institutions with information- and transaction-processing solutions. Symitar™ provides information- and transaction-processing solutions for credit unions of all sizes. ProfitStars® provides highly specialized products and services that enable financial institutions of every asset size and charter, as well as diverse corporate entities, to mitigate and control risks, optimize revenue and growth opportunities, and contain costs.

JHA is strongly committed to using advanced Microsoft® technologies internally. At the server level, the company uses a Web services solution that it developed with the help of Microsoft .NET software to integrate its products more efficiently into customers' existing systems, and it relies on Microsoft Exchange Server 2007 for dependable mobile e-mail access. The company also was an early adopter of Microsoft Office SharePoint® Server 2007. With Office SharePoint Server, JHA has affordably deployed powerful customer portals that help to enhance security, streamline problem resolution, enable rapid communication of regulatory changes, and improve overall responsiveness.

At the client computing level, JHA is a long-time early adopter of Microsoft Office desktop productivity software, most recently as an enthusiastic participant in the Microsoft Technology Adoption Program for the 2007 Office release. However, as Brad Hawkins, Manager of Networks & Devices at JHA, explains, the motivation for joining that program was not limited to the company's

tradition of early product adoption. Other motivations were an ongoing requirement to boost employee productivity, an additional method for managing IT expenses, and a way to systematically introduce cutting-edge Microsoft technologies into the company's infrastructure.

“JHA regularly uses Microsoft Office Word, Excel®, and PowerPoint® documents to enhance communications with its customers, and we're always seeking ways to create and deliver those documents more rapidly and affordably,” Hawkins says. “We are constantly developing and enhancing PowerPoint presentations for user conferences and training events, presentations that, to many of our customers, are the ‘face’ of Jack Henry & Associates as they are learning about the latest updates for JHA financial services software.”

JHA's nationwide employee base and complex system requirements pose unique challenges for the company. “Having expanded our presence to 50 offices across the United States during the past few years, we need extremely powerful tools for team collaboration,” Hawkins points out. “Moreover, like any other company, we need ways of minimizing the human and dollar resources devoted to licensing and maintaining internally deployed software and hardware. This is especially the case when it comes to implementing security patches—a process that requires constant vigilance and immediate attention when required.”

Solution

JHA installed the Microsoft Office Professional Plus 2007 suite on the computers of its entire employee base in two separate deployments, including seven internal labs and classrooms, each with 30 PCs. JHA took this approach to minimize the user impact of the changeover. At the same time, the company sought to maximize

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user productivity with targeted, one-hour training sessions.

In the first major deployment, with the help of an existing Microsoft Systems Management Server 2003 infrastructure, a two-person team used Zero Touch Deployment to bring the 2007 Office release to 1,800 users of the Windows® XP operating system with Service Pack 2 in just four weeks. That deployment, which reached power users at dozens of locations, included a highly customized set of security, document-structuring, and sharing capabilities.

In the next phase, which immediately followed the first major deployment, the team used Microsoft System Center Configuration Manager 2007 to install the 2007 Microsoft Office system on the computers of the company’s remaining 1,800 users. Hawkins explains that because of all the enhancements in the 2007 Office system, the team gave these employees a two-month window in which to become familiar with the new product.

“With the help of the Office Customization Tool, we deployed a base installation on which to train users,” Hawkins says. “Then, once those users were educated on how to work within the product’s comprehensive security framework, we deployed the full suite of built-in security features. This flexibility enabled us to deploy earlier, at the most optimal time for our business, instead of having to wait.”

Benefits

According to Hawkins, JHA is using the 2007 Office system as a powerful “business-enabling tool” for enhancing employee productivity, stimulating collaboration, and making the most of the company’s IT resources, particularly network bandwidth.

Easier Documentation Creation

Hawkins claims that employees using the 2007 Office system are simply more productive than they were in the past when creating documents in Microsoft Office Word, Office Excel spreadsheet software, and the Office PowerPoint presentation graphics program—which is a “huge advantage” for JHA and its customers. “As for the new user interface, on day 1 people said, ‘This is a big change,’ and on day 2 they said, ‘We love it,’” he reports. “They especially love the ability to right-click almost anything and get a handy list of formatting and other options. They can control the look and feel of a document almost effortlessly.”

In a personal example, Hawkins describes how he created his first Office PowerPoint 2007 presentation on an airplane, on his way to a conference. “I was awed by how easy it was to manipulate graphics and by how good the finished product looked,” he says. “In the past, to create a presentation that looked anywhere near that good would have taken the better part of a week.”

Hawkins sees his experience as typical. “Soon after our initial deployment, a small documentation team created 300 PowerPoint 2007 presentations for an important user conference in record time,” he reports. “Power users of Word, Excel, and PowerPoint 2007 are all saying that they can produce documents noticeably faster than before.”

Powerful Collaboration Capabilities

Even before JHA deployed the full 2007 Office system, the company adopted a component of that system, Office SharePoint Server 2007, while it was still in beta testing. JHA used SharePoint Server 2007 to build customer service portals that can be deployed rapidly and cost-effectively. Hawkins says that JHA has particularly benefited from the integration of Office SharePoint Server with the team-calendaring feature of the

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Microsoft Office Outlook® 2007 messaging and collaboration client, calling that feature “an important collaboration improvement for our organization.”

More recently, JHA upgraded its messaging infrastructure from Microsoft Office Live Communications Server 2005 to Office Communications Server 2007, tying solutions based on the later technology to Exchange Server 2007. Hawkins considers the presence-awareness features of Exchange Server and Office Communications Server to be vital in streamlining collaboration.

Scott Ellis, a multimedia designer at JHA, is one user of this technology who speaks highly of its capabilities for complex messaging. “Office Communicator 2007 is an invaluable tool in helping me know whether a colleague is online, enabling me to easily send them a question, a URL or network address, or other valuable and time-sensitive information,” he says. “Office Communicator helps me, as a designer, to keep both hands at the computer while maintaining the smooth flow of information necessary for effective collaboration.”

For Hawkins, it is the enhanced integration of the 2007 Office system that helps to streamline processes throughout JHA. “Whatever Microsoft Office program they are working in, employees can use the presence indicator to determine whether a colleague is online, without having to leave the application,” Hawkins explains. “In addition to enabling users to avoid back-and-forth e-mail if they want, the technologies also provide a more efficient e-mail experience through the enhanced integration of Outlook 2007 and SharePoint Server 2007.”

Hawkins explains that these collaboration initiatives are making a difference at JHA for both business and technical users. “JHA employees can collaborate far more efficiently using SharePoint portals than by

depending on e-mail—not only for creating documents, but also for testing software products,” he says. “Additionally, we will use new features in Excel 2007 for easier embedding of spreadsheets, and new features in Office InfoPath® 2007 for streamlining workflow management and developing innovative and effective ways of communicating with customers and shareholders.”

Savings on Hardware, Bandwidth, and Software

For JHA, yet another advantage of its early deployment of the 2007 Office system is a more efficient and cost-effective approach to hardware, network resources, and software. “We found that the 2007 Office release runs just fine on our existing Windows XP-based machines, so we could execute the deployment without having to purchase any new hardware,” Hawkins says. “As a result, we began realizing the benefits of the 2007 Office system without having to wait for scheduled hardware upgrades.”

The support in the 2007 Office system for Open XML Formats is making a big difference at JHA. “With the smaller files that the 2007 Office release produces through its use of Open XML file formats, we are using less bandwidth to transfer files among our dozens of offices,” Hawkins points out. “We also are using less hard disk space to store those files, for long-term savings in hardware upgrades.”

Software savings are impressive, too. By downloading the Microsoft Save As PDF add-in for use with the 2007 Office system, JHA has solved a long-time problem, according to Hawkins. “Many customers want PDF documents from us,” he says. “Being able to create and provide those documents with the help of tools already built into the Office system saves us both time and money.”

Effective Demonstration of Technology Leadership

The fact that JHA has chosen to deploy the 2007 Office system early is a powerful testament to the company's technology leadership, Hawkins points out. "Our customers look to us for technology guidance, so it makes sense that we are ahead of the curve in technology adoption. This is essential in maintaining our reputation as a trusted name in software for the financial sector."

Greater Efficiency from the Outset

A separate IT benefit comes from the expediency of the software deployment itself. As Hawkins explains, members of the JHA team used the Office Customization Tool to expedite the project by enabling or disabling selected capabilities, as appropriate for the individual or group receiving the upgrade. "By specifying which capabilities should be deployed to which individuals or departments, we were able to deploy the 2007 Office release to everyone in a given department in just one night," Hawkins says. "This contrasts with prior deployments."

Hawkins says another thing that simplified deployment was the rapid response from Microsoft when functionality updates were needed. "We received hotfixes almost immediately," he reports. "This, in combination with the enhanced built-in security capabilities of the 2007 Office system, enabled us to resolve any problems within hours or days. This is in stark contrast to prior deployments, in which we might have spent up to five weeks certifying a patch."

In both instances, JHA saved deployment resources and helped employees enjoy the benefits of the 2007 Office release much sooner. Those benefits, Hawkins emphasizes, drive home the larger value of his company's decision to deploy the software when it did.

"With the 2007 Office system, we'll boost productivity and stimulate innovation through easier and faster documentation creation," Hawkins emphasizes. "We'll enhance collaboration, simplify operations and processes, and build stronger connections among our distributed work force and our customers. In sum, we'll find it easier to launch new initiatives without necessarily having to hire more people—the hallmark of an efficient enterprise."

For More Information

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