



Windows Vista Customer Solution Case Study



PACIFIC LIFE

Overview

Country or Region: United States

Industry: Financial services

Customer Profile

Founded in 1868, and based in Newport Beach, California, Pacific Life provides insurance and other financial products and services to individuals, businesses, and pension plans.

Business Situation

Pacific Life was hindered by an inefficient approach to document access and management; lack of powerful collaboration tools, IT maintenance, and operations; and a challenging approach to legal and corporate compliance.

Solution

Pacific Life deployed Windows Vista™, two portals based on Microsoft® Office SharePoint® Server 2007, and a messaging environment based on Microsoft Exchange Server 2007.

Benefits

- Simplified document access, sharing, and collaboration
- Boost in user productivity
- Enhanced security and stability
- More efficient use of help desk
- Vastly more efficient client deployments
- Anticipated reduction in IT costs

Leading Financial Services Firm Enhances Productivity, Security, and Stability

“The integrated search capabilities of Windows Vista and the 2007 Microsoft Office system will give users an enriched environment for finding information, enhancing collaboration, and simplifying compliance.”

Cameron Cosgrove, Vice President and Chief Information Officer, Life Insurance Division, Pacific Life

Pacific Life employees needed a more efficient way to access documents and collaborate on joint projects and IT executives sought a more secure environment. In response, the executives decided to migrate 1,400 users to the Windows Vista™ operating system, deploy a collaboration portal based on the 2007 Microsoft® Office system, and implement a messaging environment based on Microsoft Exchange Server 2007. As a result, Pacific Life anticipates significant improvements in user productivity, security, and IT efficiency.



Windows Vista



Microsoft Office

Microsoft

Exchange Server 2007

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Cameron Cosgrove, Vice President and Chief Information Officer, Life Insurance Division, Pacific Life

Situation

Based in Newport Beach, California, Pacific Life Insurance Company provides life insurance products, annuities, mutual funds, and other investment products to individuals, businesses, and pension plans. Operating for well over a century and employing 3,000 people, the company has built an impressive series of achievements and today counts more than half of the 100 largest U.S. companies as its clients.

One of the keys to the success of Pacific Life is a constant monitoring and evaluation of the way employees are working, and of available tools and technologies that might help those professionals work more effectively. Not long ago, for example, IT executives in the company's Life Insurance Division recognized that knowledge professionals needed a more efficient way of working with the nearly one million documents—containing a terabyte of data—that are vital to the business.

“To access a given document, an individual had to identify where that document was stored among thousands of file shares,” says Cameron Cosgrove, Vice President and Chief Information Officer, Life Insurance Division. “Actuaries, analysts, and others found it time consuming and difficult to search for documents, preventing them from spending time on more strategic endeavors.”

To make matters worse, these professionals often faced “locked down” user access at their desktop or mobile computer, which frequently slowed them down. To use Pacific Life's diverse set of applications, users had to be granted administrator rights at the client level, a practice that prevented their computers from being “locked down” against stability and security problems.

IT professionals and marketing professionals also faced productivity challenges because

they lacked sufficiently powerful systems for collaboration and messaging. In IT, that created pain points around cross-team coordination and could impact deployment, maintenance, and operations; in marketing, it led to inefficiencies in obtaining compliance reviews and approvals for external communications.

Solution

In response to these challenges, the Pacific Life IT executives decided to migrate some 1,400 user computers from the Windows® XP operating system to the Windows Vista™ operating system. The executives also decided to develop major portal applications based on Microsoft® Office SharePoint® Server 2007 for users in IT and marketing, and to implement an overall messaging environment based on Microsoft Exchange Server 2007.

According to those plans, the IT portal will include a collaborative work environment as well as a set of standardized templates based on Microsoft Office Word 2007 for all IT deliverables. The marketing portal will provide a centralized location for collaborative review and approval of documents bound for posting on the Pacific Life Web site. The messaging environment will provide an integrated and comprehensive communications infrastructure.

The project is divided into two phases. Phase 1 comprises deployment of Windows Vista to 100 business users and deployment of the Office SharePoint 2007–based portal to IT users. Phase 2 comprises deployment of Windows Vista to the remaining users, deployment of the complete 2007 Microsoft Office system to all users, deployment of the Office SharePoint 2007–based portal to marketing users, and implementation of the Exchange Server 2007–based messaging environment.

“Employees in general will enjoy a simpler approach to large-scale collaboration, thanks to the support for centralized document repositories, version tracking, and feedback management available in the 2007 Microsoft Office system.”

Cameron Cosgrove, Vice President and Chief Information Officer, Life Insurance Division, Pacific Life

Benefits

Pacific Life anticipates an assortment of benefits from its deployment of Windows Vista, the 2007 Microsoft Office system, the portal applications based on Microsoft Office SharePoint Server 2007, and the messaging environment based on Exchange Server 2007—from more efficient information sharing and collaboration to cost savings in IT management and operations.

More Widespread Information Sharing and Collaboration

With the pervasive and integrated search capabilities available through Windows Vista and the 2007 Microsoft Office system, business users will be able to search across a vast array of document libraries, “an impossibility” with traditional file shares, according to Cosgrove. With the portals based on Office SharePoint Server 2007, IT and marketing professionals will more easily find, use, and share documents, templates, and related information.

Those portals also will enable users to collaborate more efficiently on project deliverables and enjoy a streamlined workflow. For example, marketing professionals will enjoy an easier and less costly approach to obtaining compliance approvals for marketing materials and external communications. Managers will enjoy a single access point for status information on multiple projects, simplifying decision making. All employees will enjoy a simpler approach to large-scale collaboration, thanks to the support for centralized document repositories, version tracking, and feedback management available in the 2007 Microsoft Office system.

Enhanced Productivity, Security, Stability

In the 2007 Microsoft Office system, users will take advantage of the XML-based file format to more easily manage and analyze

information; in particular, IT professionals will use that format for constructing dynamic requirements and specifications documents. Consequently, user productivity is expected to rise at virtually all levels of the organization.

According to Matthew Hansberger, Director of Information Technology Operations, user productivity also will benefit from a more effective overall communications environment. “With Exchange Server 2007, that environment will be based on a single, integrated infrastructure that is natively integrated into document repositories, and with native encryption to support enhanced compliance and security for mobile users,” he says. “As a result, all users will more easily archive and retrieve messages and documents.”

Yet another boost to user productivity will come from a more stable desktop (or mobile) environment with enhanced security. This is because in Windows Vista, users will be able to run diverse applications without needing administrative rights at the client level, enabling IT to lock down that environment.

Being able to enforce a client “lockdown” will make a dramatic difference in the organization’s ability to provide security on desktop and mobile computers, according to Jeff Cranney, Help Desk Manager. He also points out that the greater stability stemming from the ability to enforce the lockdown will make systems more available to users, further boosting their productivity, and will free up the equivalent of one person year of support time that can be devoted to more value-added endeavors.

IT Efficiencies in Help Desk, Management, and Operations

Cranney also speaks highly of the Windows Vista User Access Control feature, which “hits the mark by enabling help-desk personnel to identify and solve user problems rapidly.”

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Matthew Hansberger, Director, Information Technology Operations, Pacific Life

Another help-desk efficiency comes through use of the Enterprise Learning Framework, a tool available with Windows Vista that, in Cranney’s words, “removes much of training load from the shoulders of help-desk personnel.”

Other IT professionals will also work more efficiently. For example, through direct integration of the Exchange Server 2007–based messaging environment with Microsoft Operations Manager, administrators will be able to delegate selected troubleshooting tasks to the Help Desk and users. Through support for clustering, 64-bit architectures, continuous replication, and built-in disaster recovery, the messaging environment will deliver enhanced security and higher availability with fewer servers than before. Through native support for encryption, it will eliminate the need for third-party messaging products.

“With the Exchange Server 2007–based messaging environment, Pacific Life anticipates a significant reduction in management and operational costs,” Hansberger says.

Finally, based on their experience with these deployments, Hansberger and his colleagues expect significant savings on the deployment side of their work. For example, with the use of Windows Deployment Services, the Microsoft Solution Accelerator for Business Desktop Deployment 2007, and Windows Vista Zero Touch Installation with Systems Management Server 2003 for the Windows Vista pilot deployment, Pacific Life reduced its hardware abstraction layer (HAL) images from 40 down to 8 and migration time for each desktop from the five hours typical of prior client operating-system deployments down to just one hour.

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For more information about Pacific Life products and services, visit the Web site at: www.pacificlife.com

Microsoft Windows Vista

Windows Vista can help your organization use information technology to gain a competitive advantage in today's new world of work. Your people will be able to find and use information more effectively. You will be able to support your mobile work force with better access to shared data and collaboration tools. And your IT staff will have better tools and technologies to enhance corporate IT security, data protection, and more efficient deployment and management.

For more information about Windows Vista, go to: www.microsoft.com/windowsvista

Software and Services

- Products
 - 2007 Microsoft Office System
 - Microsoft Exchange Server 2007
 - Microsoft Office SharePoint Server 2007
 - Windows Vista