

# Investing in Email Management



When Heritage Managing Agency Limited was searching for a way in which to address the issues associated with the rapid growth of email management, storage and retrieval, the company turned to **bluesource**. As a highly-respected organisation, specialising in Microsoft Exchange environments and messaging strategies, **bluesource** migrated the company's Exchange system and implemented an email management solution to ensure reliability, while the **bluesource** Remote Operations Centre provided support of the communications infrastructure.

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Heritage Managing Agency Ltd is a specialist independent Lloyd's agency. Heritage is an established and successful company which manages Lloyd's Underwriting Syndicates. Heritage was founded in 1999 and has expanded considerably since it commenced trading. The company focuses on specialist areas of insurance and has grown from a relatively small business to having, for 2005, an annual capacity of £208 million. It is considered to be an innovative company and is highly respected within its market place.

Heritage is a seasoned expert at consistently creating wealth for its investors who trust Heritage to perform. With 60 staff members, based in the London office, staff have to trust the company's IT infrastructure to perform, to ensure day-to-day operations can be carried out in an efficient manner. In today's fast-paced financial markets, the need to have a robust and supported IT infrastructure is of paramount importance. Without the use of electronic communications, the financial markets would cease to operate in the fashion they are accustomed to, and the same can be said about companies such as Heritage.

Like most businesses, email communication is an integral part of Heritage's day-to-day business operations.

While email simplifies and accelerates communication with clients, brokers and intermediary channels, it also brings its own set of problems of spiralling growth, storage, back-up, compliance, access and archiving challenges.

Email use in general has seen phenomenal growth over the last few years with more than 16 billion person-to-person emails being sent per day and analysts forecasting this to rise to 36 billion per day in 2005.

## Pro-Active Steps

In 2002 Heritage doubled in size and the strain on the Exchange environment was beginning to show. A new syndicate was also about to commence, and the IT department had the foresight to identify the need for a prevention strategy to address the issue of spiralling email and storage capabilities, sooner rather than later.

The Heritage IT team worked with leading specialist solution providers, **bluesource**, to identify and implement an appropriate corporate-wide email management solution. London-based **bluesource** successfully migrated valuable data held within the company's existing email system into a new Microsoft Exchange environment, designed to meet Heritage's overall needs and objectives, taking into account the company's wider IT infrastructure.

“Our email system was rapidly increasing in size and we could see it becoming unmanageable,” said Andrew Buckley, Technical Architect, Heritage Managing Agency Ltd. “The Financial Services Authority (FSA) regulates Lloyd's, so we have to adhere to regulatory guidelines which stipulate the storing of information, including email, for up to seven years.”

## The journey is better together

For further information, please contact **bluesource**  
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bluesource

The issue of disparate PST files was also a major concern that we had identified.

We wanted to ensure that all unstructured data (incoming and outgoing email) could be stored in one place and retrieved so that we had a record of all correspondence, and we also wanted to futureproof the infrastructure and ensure support and monitoring of the Exchange environment.”

## Financing the ‘Best of Breed’

**bluesource** recommended VERITAS Enterprise Vault software for policy-based email management and archiving and the solution was installed in December 2002. The journaling feature was of real importance as this allows Heritage to retain a copy of every email that enters the company, negating the worry of staff members accidentally or purposely deleting data.

“The Vault enabled us to cope with incoming email and we were able to eliminate all unsupported PST files and house all the data together, back it up and secure it in one centralised system,” noted Buckley. “From talking to our users we knew that email was business critical and it falling over was not an option.”

In February 2003 and under the guidance and expertise of **bluesource**, the Exchange Server was migrated from 5.5 to 2000 to maximise flexibility, scalability, reliability and overall performance rates of Exchange data stores. In conjunction with VERITAS Enterprise Vault, Exchange is able to focus on the dynamic handling of newer information while Enterprise Vault acts as a high scale, long-term repository for older information. Server performance is dramatically improved and users enjoy instant access to all of their email without associated cost and management issues. Information can be taken from Exchange to the Vault and very quickly restored for easy access.

**bluesource** having been involved with many Vault and migration projects recommended a managed outsourced solution to address the issue of ongoing Exchange support and maintenance.

**bluesource** was instructed to manage the new Exchange environment from its Remote Operations Centre, giving Heritage a high-quality service level agreement for mail server uptime, improved business continuity, enhanced disaster recovery, and overall peace of mind.

**bluesource** is a leading IT consultancy that uses its proficiency with the Microsoft Exchange and messaging environments to help companies implement the right solution, bridging the gap between business benefit and IT. The **bluesource** Remote Operations Centre ensures dedicated support staff constantly monitor client environments to ensure that if an incident occurs, appropriate and quick remedial action is taken. When an alarm is “triggered”, a call is logged in the **bluesource** helpdesk system and a unique identifier is allocated to the call. This outsourced offering provides clients with peace of mind, as it ensures the exchange environment remains secure and running.

“**bluesource** has really addressed the needs of our business and email for us, is a critical application,” commented Buckley. “Our email server holds 28GB and the Vault holds 72GB and it takes us seconds to be able to restore the information we need, and we only need to use a medium size Exchange server instead of a large one. If there is a problem out of hours, the **bluesource** monitoring system sends a text to my mobile telling me the system is breached, and I know that they’ll have it in hand and will get it back up in no time.”

**bluesource**’s Remote Operations Centre keeps constant watch over Heritage’s messaging system, pre-empting problems, and guaranteeing absolute minimum downtime.

“We concluded that the **bluesource** system saves us one man day a week, which is a huge advantage as we are constantly looking to improve operations using the resources we already have,” noted Buckley. “**bluesource** has helped to educate us on best practice use of our system, while the infrastructure is just more robust and reliable and just works!”

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