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Glenn Lefrancois
Vice President of Information Technology



Archive • Comply • Discover



MacDougall, MacDougall & MacTier Inc.
Service to investors since 1849

Industry

Financial Services

Location

Montreal, Quebec, Canada
(Head Office)

Challenges

Migrating away from old service provider to a new solution that supports journaling without having to upgrade email server

Solution

LiveOffice AdvisorMail
LiveOffice Discovery Archive
LiveOffice Personal Archive

Results

Implemented a comprehensive archiving solution that meets compliance and backup needs, is easy to use and saves money

Former Solution

On-premise Microsoft Exchange 2003
FrontBridge (Microsoft Exchange Hosted Archive)

Other Solutions Evaluated

On-premise Microsoft Exchange 2007
Microsoft Exchange Hosted Services

3 Macs Finds Comfort and Reliability in the Cloud via Software-as-a-Service

MacDougall, MacDougall & MacTier Inc., also known as 3 Macs, is an independent, employee-owned investment firm in Canada focusing on wealth creation and management. Founded in 1849, 3 Macs has seen five generations of MacDougalls throughout its 160-plus-year history. The firm provides high-quality investment advice on the foundation of four fundamental principles: integrity, independence, performance and service.

With four branches spread across Canada and a total of 235 mailboxes, having a reliable email archiving solution is a must. Like all financial services organizations, 3 Macs is required to adhere to a variety of regulations, so compliance is top of mind.

Choosing the “Right” Software-as-a-Service Provider

Software-as-a-Service (SaaS) wasn’t a new concept for 3 Macs. The firm had been using SaaS for seven years, but it was time for a change. “Choosing the right SaaS provider had to do with comfort level, and we were very comfortable with LiveOffice, its staff and its service,” said Glenn Lefrancois, vice president of information technology. Aside from overall comfort, cost, reliability and support help were 3 Macs’ key considerations for choosing an archiving vendor. “Since this [archiving] isn’t our core business, we really needed someone to hold our hand and walk us through the process,” Lefrancois continued. “LiveOffice was there every step of the way. Their sales representative, account manager and the engineering team were great!”

Compliance Made Easy

As a stockbrokerage institute, 3 Macs needs to comply with various laws, regulations and industry rules. The firm must be able to provide proof of emails and chain of custody, if necessary. On average, Lefrancois and his team have to conduct at least two searches a week, including corporate-wide searches. LiveOffice AdvisorMail, combined with LiveOffice Discovery Archive and LiveOffice Personal Archive, allows the organization to do just that—and much more. “I just had to conduct a search for someone this morning, and it went very well,” said Lefrancois.

Launching a New System

As with any big change, there’s always some hint of apprehension. Although 3 Macs was comfortable with LiveOffice and its SaaS-based solutions, Lefrancois expected a few normal hiccups. “We conducted a couple of mock runs and expected 10 percent of users to run into issues. We went live at 1 p.m. on a Friday, and we were confident by 3 p.m. I didn’t have to worry about it after that.”

Lefrancois marveled at the simple setup and smooth transition to the new system. “Journaling was new to us,” he said, “but LiveOffice provided step-by-step instructions and it just worked – very cool! We learned a lot in the process.”

Simplifying Mailbox Management

Mailbox quotas were a big consideration for 3 Macs because of storage costs. Personal Archive has made a big difference throughout the organization. End users can keep their inboxes clean and manageable without worrying about losing important emails, because they have unlimited mailboxes. “End users are still in the process of getting used to it, but the feedback is positive so far,” said Lefrancois. “In our world [IT], no news is good news. I like it a lot. Searches are very powerful and fast, and finding a sent email is much faster than it was with our previous provider.”

“Because LiveOffice only charges per email box instead of by email volume, we’ve seen a 72 percent savings.”

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Getting Personal Archive folders out to end users is a breeze with the LiveOffice CloudLink tool. “I just released CloudLink, and I couldn’t believe how easy it was!” said Lefrancois.

While some end users are still getting used to having the power to access their archives at their fingertips, Lefrancois is seeing a significant reduction in help desk calls. “We used to get 10 to 12 calls a week. Now we only get one, which would be considered a bad week.”

Lefrancois is also impressed with the real-time indexing. “The speed in which emails land in the archive is amazing! It used to take four times as long.”

The LiveOffice Difference

LiveOffice’s goal is to meet and exceed its clients’ expectations every day. 3 Macs was looking for a reliable, user friendly solution that was easy to setup and saved the firm money. But they got much more. “My team loved the direct link to LiveOffice support via a live chat,” said Lefrancois. “They walked us through the process of setting up users, disabling users and more. The support team is very responsive and very helpful.”

LiveOffice offers complimentary training sessions for its clients every week. Most other vendors charge for these types of trainings. “We have taken a training course for Setup and one for How the Archive Works,” says Lefrancois. “The topics are great, the training sessions are easy to join, and best of all, it’s free.”

Addressing Special Requests

3 Macs also had some special requests that needed to be addressed. The first hurdle was due to language. The system wasn’t setup for French, which posed a problem for its branches. Instead of saying no, LiveOffice stepped up to the challenge and presented a solution. “We had to wait two months, but then it came through and was great,” said Lefrancois. Secondly, 3 Macs also required a certificate onsite to securely connect to LiveOffice’s archiving services, and LiveOffice delivered again. “It’s up and running and working perfectly!”

Savings with SaaS

LiveOffice’s unlimited mailbox feature makes a big difference, especially when it comes to budget. “Because LiveOffice only charges per email box instead of by email volume, we’ve seen a 72 percent savings,” said Lefrancois. “In addition, we don’t have to pay for aliases with LiveOffice.”

Lefrancois says he’d recommend LiveOffice solutions to others, especially for the good support and help from the LiveOffice team as well as for the cost savings. He considers the switch to LiveOffice a “big, big success.”



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For More Information

Contact our email experts and learn how we can help you meet your archiving, compliance and discovery goals.

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