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Marta Reed
Senior Project Manager



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Washington
Federal
Savings

Industry

Financial Services

Location

Seattle, Washington (Headquarters)

Challenges

Outdated email service and lack of an automated email archiving solution

Solution

LiveOffice Hosted Exchange 2007
LiveOffice Personal Archive
LiveOffice Discovery Archive

Results

Improved email performance, significantly reduced IT management time and much quicker search capabilities for e-discovery and other needs

Former Solution

IMail

Other Solutions Evaluated

On-premise Microsoft Exchange Server

Washington Federal Savings Updates Technology, Improves Efficiency

Independently operated since its founding in 1917, Washington Federal Savings provides mortgage and construction financing for single- and multi-family residential housing. As a traditional thrift, the financial institution also provides FDIC-insured savings and checking accounts in 150 U.S. locations.

Washington Federal has focused on keeping things simple from the beginning. Its reputation is based on offering sensible, easy-to-use accounts and services, combined with personal attention to its customers' financial goals. Despite growing turmoil in the financial markets, the institution is still growing through new branch openings and acquisitions. Headquartered in Seattle, Washington Federal became a public company in 1982 and trades on NASDAQ under the symbol WFSL.

Bringing Technology into the 21st Century

The top priority for Washington Federal was to modernize its technology. This meant first moving off of its outdated IMail system with a look toward Microsoft Exchange. But determining whether or not to manage it in house or outsource the time-consuming task to a software-as-a-service (SaaS) company was a big consideration that required a lot of thought and some serious discussions. "Our IT manager wasn't sure if we'd be happy with Exchange, so we wanted to give it a test run to make sure it was going to work for us," said Marta Reed, senior project manager. "Ultimately we wanted to get out of the business of managing email, while still providing a smooth experience for our end users. As a project manager, I was very hesitant to outsource Exchange and lose control of the conversion process, but the conversion with the LiveOffice team was well planned and ran smoothly."

Washington Federal recently merged with several banks, resulting in 1,200 mailboxes in 150 different locations. All IT is managed from one location, so it was imperative to get everyone on the same system. "LiveOffice's fully hosted model made a big difference," said Reed. "It's so much easier to manage all of our offices remotely [in the cloud] from the administrator console, instead of having to setup multiple servers in various locations. It also reduces the time required to setup email communications for our ongoing acquisitions."

Implementing an Archiving Solution without Disrupting Business

Updating its email platform was only half the battle. Washington Federal also needed to implement a seamless email archiving solution – something the institution was lacking. "The LiveOffice archiving solution was the only one that truly looked like it worked," said Reed. "Plus, they offered setup service that others were not providing to the same degree."

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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.

Although e-discovery wasn't a huge concern, Reed has found LiveOffice Discovery Archive is more than a "nice to have." It has proven to be extremely helpful in the department's day-to-day IT work. "The LiveOffice archiving solutions have proven to be very, very helpful," she said. "We can go in and search mailboxes quickly and easily to find files and other data. It's the smoothest and easiest way to search for information."

End users are also discovering the power of LiveOffice Personal Archive. "I've had a few people distraught over lost email," said Reed. "We showed them how to use Personal Archive to find it, and they were very excited to get their email back. The ability to keep a clean inbox and not have to create intricate filing systems for old emails is a big bonus."

A New Appreciation for SaaS

Washington Federal was open to a SaaS solution but initially had some concerns. "We were very hesitant to outsource Exchange, but the amount of time we have not had to manage it has been really good," said Reed. "The automatic updates were a major deciding factor. LiveOffice stays up to date and takes care of everything, so we don't have to dedicate an Exchange admin to run the system."

Bringing consistency across the board was another big deciding factor. "When we were looking for a solution, we had just completed two mergers," recalls Reed. "These banks had their own Exchange Servers, one had an archiving solution, which was difficult and cumbersome to use, and the other had no archiving at all. Getting every location on one solution has made a real difference in how we allocate our resources – the time savings is invaluable." Ultimately the LiveOffice Hosted Exchange 2007 and email archiving solutions free up valuable IT resources to focus on other important business initiatives.

Providing a smooth experience for end users was also an important consideration. Washington Federal wanted to make sure its new system was easy to use, more stable and a better overall user experience. "Since implementing LiveOffice solutions, we have less downtime and better productivity for end users," said Reed. "The ability to securely access their email from locations outside of Washington Federal is a big win with our users. Everyone is pleased with the performance of the system."

Top-level executives are also very happy with the user experience, including Washington Federal's chief financial officer, Brent Beardall. "I love LiveOffice; it's an awesome service!"

Putting the Service in Software-as-a-Service

LiveOffice doesn't just tout its service, it demonstrates it every day. "When we came across some challenges, the LiveOffice team immediately got on the phone to help and resolved our issues quickly," said Reed. "LiveOffice is committed to finding solutions. They keep their promises and their service record is first-rate."

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