

## HORIZON21

## Investment Company Employees Improve Collaboration with Unified Communications

### Overview

**Country or Region:** Switzerland

**Industry:** Financial services

### Customer Profile

Switzerland-based Horizon21 offers financial products and services. Its 140-plus personnel work from offices in countries across the world.

### Business Situation

The company wanted employees to spend less time managing inboxes but also to have greater visibility of colleague availability and better access to conferencing technology.

### Solution

Horizon21 deployed Microsoft® Office Communications Server 2007 and Microsoft Office Communicator 2007 in a successful pilot program.

### Benefits

- Less time managing messages
- Reaching colleagues quicker
- Faster decision making with conferencing
- Tighter collaboration with partners

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Daniel Sidler, Chief Technology Officer, Horizon21

Switzerland-based Horizon21 is a successful financial services company, dedicated to identifying and exploiting attractive investment opportunities. Most of its employees spend the day at their desks using voice over IP (VoIP) and e-mail to collaborate with colleagues, business partners, and clients. To support faster and more efficient day-to-day communication with colleagues, Horizon21 wanted to increase the number of real-time communications channels and reduce dependency on e-mail. To meet these goals, Horizon21 is deploying Microsoft® Office Communications Server 2007 and Microsoft Office Communicator 2007. The new solution’s instant messaging, presence awareness, and VoIP telephony have reduced e-mail traffic and the number of unanswered calls, helping employees work more effectively.

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## Situation

Founded in 2004, Horizon21 is an investment management company based in Pfaeffikon, Switzerland. It provides a range of innovative products for private and institutional clients such as pension funds, banks, and insurance companies. With offices in Pfaeffikon, Zurich, London, Hong Kong, Bratislava, and the Cayman Islands, the company employs 140 personnel. In September 2005, Swiss Re, a world-leading reinsurance company, became a strategic partner buying a 20 percent stake in Horizon21 Alternative Investments. One year later, Horizon21 and Swiss Re joined forces in a private equity fund of funds business.

In a role where success depends on identifying and exploiting investment opportunities, Horizon21 employees need reliable, versatile channels of communication. They spend most of the working day in the office, collaborating with colleagues, business partners, and clients by telephone and e-mail. In many cases, they need to make decisions in a matter of minutes, with the result that most employees prefer to be at their desks rather than traveling or in meetings.

To meet the needs of employees, Horizon21 has invested significant resources in its communications infrastructure. Shortly after it was founded, the company standardized on Microsoft® software, deploying Microsoft Exchange Server 2003 for e-mail and scheduling. In addition, it deployed e-phone from Microsoft, an IP-based software solution that integrates with Microsoft Office Outlook® 2003 messaging and collaboration client.

“Using e-phone, employees can launch calls from a click-to-dial feature in Office Outlook, speaking to people using a headset and microphone plugged into a USB port on their computers,” says Daniel Sidler, Chief Technology Officer of Horizon21. “Computer-

to-computer calls between our offices are free. And with an IP-based telephony system we can plug calls straight into the Public Switched Telephone Network (PSTN), avoiding the expense of Private Branch Exchange (PBX) systems.”

Employees took to the system enthusiastically and it was striking how quickly working habits changed. When working in Outlook 2003, they typically tried to place an e-phone call and switched to e-mail if no one replied. But the company still felt there was room for improvement.

Sidler says, “It’s all very well being able to place a call or send an e-mail quickly. But if you don’t know whether someone is available to answer, it just becomes wasted time—especially when deadlines are looming and employees are under pressure. We also wanted to find additional ways of reducing e-mail and cutting back on administration that reduces time available for working with client portfolios and devising new investment strategies.”

In addition, the company didn’t support an instant messaging (IM) solution across the business, although some employees used publicly available IM services to collaborate with colleagues and business partners in other companies. “We didn’t publicly advocate the use of IM, but we knew that it provided a valuable alternative to e-mail and helped people manage business communication more effectively,” says Sidler.

Horizon21 also wanted to explore the benefits of other communications channels. “We could imagine that there were benefits to be gained from video and Web conferencing—especially between offices when you want to demonstrate or visualize a process instead of describing it on the phone,” says Sidler. “We also work on the drafting and publication of complex business

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documents. Being able to review these as part of an inter-office, collaborative process is extremely helpful, but we wanted a solution that was easy to use and that integrated with existing personal computer applications.”

### **Solution**

Horizon21 discussed these objectives with Microsoft. Following a series of meetings, Sidler and his colleagues decided to deploy a pilot of Microsoft Office Communications Server 2007 and Microsoft Office Communicator 2007. In late 2007, working with Microsoft Gold Certified Partner webcall, the company installed a server computer running Office Communications Server 2007 Standard Edition in a single afternoon. At the same time, it rolled out the Office Communicator 2007 client on a handful of computers belonging to the IT department.

After a short training session, IT personnel based in Pfaeffikon and Bratislava began using the conferencing (audio and video), IM, and presence awareness features, which highlights colleague availability.

Another 30 employees, including investment professionals, will begin using Office Communicator 2007 in the middle of October 2007. “We now plan to roll out Office Communications Server 2007 across the whole company in phases to minimize disruption and coordinate the training process across departments,” says Sidler. Once deployment is complete, in 2008, the finished architecture will include:

- Office Communications 2007 edge servers for federation and remote access.
- Office Communications 2007 mediation server, which ensures interoperability between Office Communications Server 2007 and a media gateway.
- Dialogic® DMG4060 Media Gateway, which connects Office Communications Server 2007 to the PSTN.

Sidler says, “We found that Dialogic offers a range of enterprise-class media gateway products to support Microsoft Office Communications Server 2007. Our experience has been that Dialogic gateways are designed for simplicity, PBX interoperability, and price performance, plus they are backed by a worldwide distribution and support organization.”

He continues: “At present, I can’t give a date when everyone will use the VoIP telephony services in Office Communications Server 2007, but over time we’ll phase out e-phone.” Already, Sidler and his colleagues have tested some of the telephony devices that personnel will use with Office Communicator 2007. The devices include the Polycom CX200 desktop phone. Horizon21 was impressed by the performance of the devices, which delivered high-quality, high-definition audio that enhances voice communications.

Looking ahead, Horizon21 also aims to federate with partners so personnel can extend the use of presence information and check the availability of people outside the company. What’s more, Sidler is planning to roll out Microsoft Exchange Server 2007 with Unified Messaging in 2008. “By moving to Exchange Server 2007 Unified Messaging, employees can use Microsoft Office Outlook Voice Access to retrieve messages in inboxes using speech or touch-tone recognition. They will be able to listen to e-mails, calendar appointments, and other information from their phone.”

### **Benefits**

With Microsoft Office Communications Server 2007 and Office Communicator 2007, Horizon21 expects that employees will rely even less on e-mail—saving time each week normally spent managing messages. Instead, personnel will send a quick IM or launch a computer-to-computer or computer-to-PSTN

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call rather than exchange written messages. When required, they will be able to switch seamlessly from one form of communication to another using the Office Communicator 2007 client. The use of enhanced presence awareness features is expected to save personnel additional time each week that they normally spend trying to locate colleagues. Presence information will also be extended to workers in partner organizations. With conferencing (audio, video, and Web) available from the desktop, they will be able to make decisions more efficiently, principally because groups can collaborate on documents across a Web conferencing connection.

#### **Better Message Management Boosts Efficiency**

By using IM alongside e-mail, employees will save time each week by sending and receiving fewer e-mail messages. Sidler says: “When I started using enhanced IM in Office Communications Server 2007, it soon became my default option for written communications. I want a short response to a simple question, so IM is perfect.”

The ability to switch easily between different communications channels also removes the need for e-mail. Sidler likes the fact that he can escalate an IM conversation as a more in-depth discussion evolves. “You can escalate an IM to an e-mail, a voice call, or a conference in Office Communicator 2007 using a few mouse clicks. There is no need to search for a number or change applications during the process.”

#### **Presence Awareness Saves Time**

With presence awareness in Office Communicator 2007, employees spend less time trying to reach colleagues. Sidler says, “Presence awareness in Office Communicator 2007 saves employees valuable time. They instantly know a colleague’s availability and have the tools at their fingertips for

contacting that person using IM, e-mail, or a voice call.”

The technology really comes into its own when employees are facing imminent deadlines. “In those few remaining hours before a deal is finalized, with Office Communicator 2007 our personnel have a constantly updated view of colleagues’ availability, helping to keep everyone on track and on schedule.”

#### **Conferencing Helps Accelerate Decision Making**

With the conferencing (audio, video, and Web) available in Office Communicator 2007, Horizon21 expects to accelerate the decision-making process. Sidler even found this useful during the testing process. He explains, “I started discussing the telephony devices for Office Communicator 2007 with a colleague. We were using Office Communicator 2007, and I went from a computer-to-computer call straight into a videoconference to show him the devices that had just arrived at my office. There was no need for us to do a follow-up, so he had time to go away and look up the devices on the Internet.”

The company also expects that multiparty, Web-based conferencing technology will help cut project life cycles. “With Office Communications Server 2007, we can host Web conferences on-premise,” says Sidler. “This way, project managers collaborate on a single document at the same time instead of circulating documents and waiting for feedback from individuals.”

#### **Federation Promises Better Collaboration with Third Parties**

In the future, Horizon21 will offer a supported service so personnel can send IMs to external parties who use Office Communications Server 2007 or public IM systems such as Windows Live, Yahoo!, and AOL. These parties

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

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will be added to a federated contacts list, which will also offer presence awareness.

“Extending the benefits of IM and presence awareness in Office Communications Server 2007 beyond the corporate firewall offers a lot of value,” comments Sidler. “Employees want to send IMs just as much to business partners as they do colleagues, so it makes sense to create federations. Likewise, knowing the availability of a partner using presence awareness will support collaboration processes better.”

## Microsoft Office System

The Microsoft Office system is the business world’s chosen environment for information work, providing the programs, servers, and services that help you succeed by transforming information into impact.

For more information about the Microsoft Office system, go to: [www.microsoft.com/office](http://www.microsoft.com/office)

### Software and Services

- Microsoft Office
  - Microsoft Office Communications Server 2007
  - Microsoft Office Communicator 2007

### Hardware

- Dialogic® DMG4060 Media Gateway
- Polycom CX200 desktop phone

### Partners

- webcall