HyperOffice
Collaboration Made Simple

O'Meara, Ferguson, Whelan, and Conway
Financial Services

THE CUSTOMER

O'Meara, Ferguson, Whelan, and Conway integrates specifically crafted financial strategies, access to capital financing alternatives, investment management advice, and stewardship-based fundraising counsel to manage and leverage financial assets to build fiscal strength and independence. The majority of their clients are Catholic organizations such as regional Archdiocese, including the Chicago Archdiocese and the Archdiocese of Arlington, VA.

THE CHALLENGE

An Executive Initiative
In the summer of 2008, O'Meara Ferguson executives declared an initiative to create a common collaborative space for contacts, calendar events and documents to be accessed company-wide. As their newly appointed director if IT, Sean Rutherford was tasked with obtaining a solution within budget and with the requested functionality in a single solution.

THE JOURNEY

The search to procure a solution took a number of different routes. As a seasoned IT professional, Sean's initial thought was to obtain different options of installed solutions. This quickly changed after researching various options and realizing that the cloud computing concept was likely the best avenue to address these requirements within the allotted budget.

THE DISCOVERY

Safety in the Cloud
After reviewing a number of online collaborative options, Sean began to feel concerned that none of the initial options review seemed to have the security and track record required to satisfy the executive team from a stability perspective. This was until he found HyperOffice. As a company with 10 years experience in the hosted application market and well documented hosting facility and back-up details, Sean felt comfortable recommending HyperOffice to his team.

As the evaluation of HyperOffice progressed not only did Sean become more interested in the solution, but he found that the HyperOffice suite could be expanded to include other services to address secondary requirements such as email marketing, web conferencing, and even a database. In Sean's eyes this was ideal since this would give him and his team a one stop resource for all of their shared business applications. To

top it off, as a complete suite, HyperOffice included an integrated email solution that would become the core of the product and a surprise hit for his users.

THE SOLUTION

Quick, Easy and Scalable

Once it was determined that HyperOffice was the clear solution for O'Meara Ferguson, there was the matter of delivering within budget. Luckily, the rates associated with HyperOffice licenses are structured in such a way where there is minimal upfront cost and the ability to scale up or down in the event of organizational restructuring. This would prove to be very desirable for Sean and his executive team. A decision was made to move forward with the full package to include all of the additional offerings available- this included a company-wide transition to the HyperOffice mail platform.

THE IMPLEMENTATION

Enhanced Processes and Business Flow

As the IT director, Sean was tasked with heading up the company-wide implementation and deployment of HyperOffice. This process started with three hands-on training sessions delivered via web conference. To enhance this he was able to use videos of recorded training sessions to review topics as needed. He also became well-acquainted with the HyperOffice support staff, as he used them as a guide during the implementation phase. Once the system was fully deployed, his users quickly noted the ease of use and general intuitive nature of the system. Within one week the entire organization was not only using the shared calendar for their events, and shared documents for files, but also the email system for daily use.

Not Bad for the New Guy

Following deployment, Sean received warm reviews from his colleagues noting that it has improved internal processes and communications significantly. This proved especially helpful since this was in his first three months with the company. Meetings that were once coordinated via email were now set in the company calendar. Documents that were once split into multiple files and versions via email were now hosted and accessible.

The use of HyperMeeting (the integrated web conferencing solution) prompted many within O'Meara Ferguson to rethink the way they conduct meetings and more began holding remote sessions in place of client visits- this significantly decreased the amount of time and money spent on travel.

Solving Unique Problems

Almost a year following the initial implementation, O'Meara Ferguson employees are well rooted in the HyperOffice environment. In fact, HyperOffice has become almost a technical consultant for O'Meara Ferguson. In a unique scenario in September 2009, O'Meara Ferguson needed a temporary solution to receive documents and collaborate with a group of 600 clients over the course of two months. HyperOffice was there to help. Sean was able to work with his account representative to tailor a license specific to this scenario and within the requested budget. The set-up and implementation of this temporarily client extranet was facilitated by HyperOffice by allowing for a one-time import of users and an export of users at the end of the two month period. This made a unique and potentially troublesome requirement a breeze.

O'Meara Ferguson has big plans for growth over the next few years and anticipates using HyperOffice as a means to drive this growth by further adapting the evolving HyperOffice products to meet their evolving needs.