



### Overview

**Country or Region:** United States

**Industry:** Architecture, engineering, and related services

### Customer Profile

Perkins+Will is an architecture and design firm that has worked on projects in 43 countries. Founded in Chicago, Illinois, the privately held company employs 1,300 people in more than 20 offices.

### Business Situation

The company wanted to consolidate its multiple voice-mail systems onto one at the corporate data center. However, that voicemail system had reached the end of its support cycle.

### Solution

Rather than expanding its previous voicemail system, Perkins+Will deployed unified messaging on Microsoft® Exchange Server 2007 and the Windows Server® 2003 R2 Enterprise x64 Edition operating system.

### Benefits

- Extends staff with targeted consulting
- Facilitates cost savings
- Enables greater efficiency
- Simplifies system administration
- Boosts collaboration

## Architectural Firm Simplifies Processes and Cuts Costs with Unified Messaging

“Unified messaging has made it much easier to keep up with all my different methods of communication.... Today, I’m more inclined to listen and respond to voice-mail messages than I was before.”

Greg Fait, Director of IT Infrastructure, Perkins+Will

Perkins+Will is a globally recognized architectural and design firm. In September 2006, the company learned that support would soon end for its main PBX voice-mail system. With the system at capacity, and a smaller voice-mail system in use at several offices, Perkins+Will considered its options. Rather than consolidating on the previous voice-mail system, the company chose a unified messaging solution built on Microsoft® Exchange Server 2007. Currently, Perkins+Will is deploying unified messaging, along with other products in the Microsoft Enterprise CAL Suite including Microsoft System Center Operations Manager 2007, Microsoft Forefront™ Security for Exchange Server, and Microsoft Office SharePoint® Server 2007. As a result, the company will cut costs, boost efficiency, and simplify system administration. The highly scalable system will also enhance communication and collaboration.



## Situation

Founded in 1935, Perkins+Will is one of the most respected design firms in the United States. Along with winning numerous awards from the American Institute of Architects, Perkins+Will has also been recognized internationally for its achievements in architecture, interior design, branded environments, and planning and strategies. Founded in Chicago, Illinois, the privately held company employs 1,300 people spread across sites in North America, Shanghai, London, and Dubai.

The employees at Perkins+Will work on teams that include people from multiple locations. This collaborative approach makes better use of employees' expertise. "Probably 40 percent of the work we do involves multiple office pursuits and engagements, so it's critical that we communicate and collaborate well," explains Rich Nitzsche, Principal and Chief Information Officer at Perkins+Will. "There's a fair number of employees pushing data around our network each day. E-mail is really the backbone for communications."

The messaging environment at Perkins+Will was running on Microsoft® Exchange Server 2003 Enterprise Edition, the Active Directory® service, and the Windows Server® 2003 Standard Edition operating system. Seven servers located across the United States and one server in Canada hosted the company's Exchange Server environment. Employees accessed e-mail from workstations running the Microsoft Office Outlook® 2003 messaging and collaboration client. Or employees accessed e-mail on the road using a portable computer running Microsoft Office Outlook Web Access or a Treo mobile device enabled with GoodLink from Good Technology.

As a result of corporate acquisitions, Perkins+Will inherited several voice-mail

systems. Most of the offices in the United States used the Avaya Octel system; the sites in Vancouver and Victoria, Canada, used other systems that came with non-Avaya private branch exchanges (PBXs).

As the company began to bring the Canadian offices onto the Avaya network, IT personnel discussed how they could consolidate the Canadian systems onto the Avaya Octel system. Doing so would require a significant investment, however, because the Avaya Octel system was at full capacity. Furthermore, in September 2006, Perkins+Will learned that Avaya was ending support for the Octel system. "Given our need to consolidate our voice-mail systems, we took a step back to see what our options were," says Greg Fait, Director of IT Infrastructure at Perkins+Will. "We didn't want to perpetuate an Octel solution just because that's what we had been using."

Hoping to avoid a significant investment in its previous voice-mail system, Perkins+Will looked at alternative solutions. "I've always wanted to deploy unified messaging, but up until now, the options had not been particularly attractive or well integrated with the Microsoft platform," notes Nitzsche. "So I was pretty thrilled when I saw the first blush of unified messaging in Exchange Server several years ago at a Microsoft CIO Summit in Redmond. Naturally, the technology has since been on my radar."

## Solution

In December 2006, Perkins+Will spoke with Microsoft about its upcoming release of Exchange Server 2007. The product would allow Perkins+Will to create a unified voice mail system, without ripping and replacing its existing systems. In addition, Exchange Server 2007 offered a fully integrated unified messaging capability so that employees could access, annotate, and forward voice mail, e-mail, and faxes from their e-mail inboxes.

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Greg Fait, Director of IT Infrastructure,  
Perkins+Will

Employees could also use a phone to access, forward, and save their e-mail and voice mail messages—or access and manipulate their calendar, contacts, or tasks.

“After looking at all of our available options, unified messaging in Exchange Server 2007 was a great fit,” says Fait. “Using a speech-enabled interface to access messages and being able to sync up our mobile and local inboxes are great features to have.”

“Another reason we chose to deploy unified messaging in Exchange Server is that I was really looking to create a more converged messaging environment—one that’s well integrated with our Microsoft Office environment,” adds Nitzsche.

By January of 2007, the company had joined the Exchange Server 2007 Unified Messaging Rapid Deployment Program. With its IT department already busy with other projects, Perkins+Will researched third-party vendors and chose Project Leadership Associates (PLA) and Enabling Technologies to help deploy a unified messaging solution. Microsoft Gold Certified Partners, both PLA and Enabling Technologies were highly recommended by customers who had already deployed unified messaging and Exchange Server 2007.

“PLA and Enabling Technologies offer a strong partnership to customers,” says Don Penland, Communication and Collaboration Solution Group Leader for Project Leadership Associates. “We each specialize in a different area of messaging. PLA offers deep expertise in Exchange Server, while Enabling Technologies offers deep expertise in unified messaging and telephony.”

Instead of deploying Exchange Server 2007 to everyone at once, Perkins+Will chose to phase-in unified messaging in an initial deployment that included the company’s 30

IT employees. To enjoy all of the benefits of unified messaging, Perkins+Will also decided to deploy Microsoft Office Outlook 2007 and Microsoft Office Professional 2007.

“We decided to roll out the new versions of Office Professional 2007 and Office Outlook 2007 along with our initial deployment of Exchange Server,” Nitzsche explains. “Our deployment of Office Professional 2007 connects to our other IT strategies as well.” Perkins+Will is in the process of deploying the Microsoft Enterprise Client Access License (CAL) Suite. Designed to boost communication and collaboration, the Enterprise CAL Suite includes 11 products, including Exchange Server 2007, Microsoft Office SharePoint® Server 2007, and Microsoft System Center Operations Manager 2007.

#### **Deploying Exchange Server 2007**

In March 2007, PLA began the migration to Exchange Server 2007 by using the Microsoft Exchange Server Best Practices Analyzer. The tool evaluated the existing Exchange Server and Active Directory infrastructure. “It was great to be able to check the environments to rule out any potential problems before deployment,” says Forrest McDuffie, Senior Consultant at PLA. “It turned out the environments were healthy, aside from some minor replication issues that we were able to fix. After we had completed the architectural analysis, we spent several days evaluating possible system designs. One of the goals of Perkins+Will was to design an environment that could support its long-term goals.”

Perkins+Will selected an architecture built on three IBM x3650 rack-mount servers, located at the corporate data center in Chicago. One server supports the Hub Transport and Mailbox roles; another server supports the Unified Messaging role; a third server supports the Client Access role. All three systems run the Windows Server 2003

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Enterprise x64 Edition operating system and Microsoft Exchange Server 2007 Enterprise Edition, which runs natively on Windows Server x64 Editions.

#### **Setting Up Unified Messaging**

At the end of March, Enabling Technologies spent a morning installing and configuring a Dialogic DMG2030DTIQ Media Gateway at the corporate data center. The gateway supports communication between the company’s existing Avaya PBX and Exchange Server 2007. In the afternoon, Enabling Technologies explained how the gateway was set up and how it worked, so that IT personnel at Perkins+Will could later scale the gateway to support the entire company and replace both previous PBX voice-mail systems.

Consultants from Enabling Technologies spent the next two days working with the phone administrator at Perkins+Will. The team configured and tested the unified messaging system so that it could receive calls. In addition, the consultants deployed Message Waiting Indicator (MWI) 2007 from Geomant. MWI 2007 gives Exchange Server 2007 the ability to light the lamp on a desk phone when a voice message is received. Consultants used a series of commands in the Windows PowerShell™ command-line interface to configure each unified messaging mailbox to allow the message-waiting light to work.

“We relied on System Center Operations Manager 2007 throughout the setup and deployment of our pilot environment to proactively identify any potential issues,” notes Fait. “We didn’t have many warnings, but having Operations Manager monitoring events gave me a comfort level I wouldn’t have had otherwise.”

Since the initial pilot deployment, Perkins+Will has migrated approximately 70

employees to e-mail running on Exchange Server 2007. Over the next few weeks, the company will be increasing the number of unified mailboxes to 45. Over the next 6 to 12 months, the company plans to migrate all of its employees to the unified messaging environment running on Exchange Server 2007, Office Professional 2007, and Office Outlook 2007.

#### **Benefits**

By engaging PLA and Enabling Technologies to help with the deployment of unified messaging, Perkins+Will was able to supplement its IT staff with targeted help from consultants. Although the company is only in the early stages of deployment, Perkins+Will can already see the potential benefits of the new solution—namely, cost savings, greater efficiency, and simplified system administration. The system will also provide for scalability and increased communication and collaboration.

#### **Extends Staff with Targeted Consulting**

Because Perkins+Will had never deployed a unified messaging solution, it turned to PLA and Enabling Technologies for help. By doing so, Perkins+Will was able to rapidly design a server infrastructure that can support the entire organization and a gateway system that can be easily expanded. “PLA went above and beyond to help make sure that our design was going to support our future goals,” says Fait. “The company made sure we weren’t shooting ourselves in the foot with a design and implementation that would force us in a particular direction.

“What really impressed me about this deployment was the amount of knowledge, resources, and effort PLA offered,” continues Fait. “PLA was 100 percent committed to making this work for us, and they worked harder than any other consultants we’ve worked with.”

### **Facilitates Cost Savings**

Unlike with previous PBX voice-mail systems, IT personnel can maintain the unified messaging system and consequently reduce maintenance costs. "Our old voice-messaging system was very stable, but it required third-party experts to upgrade or configure," Fait says. "Changing the capacity on our PBX systems was complicated and expensive, and the procedure was riskier. With Exchange Server 2007, we can change capacity, incrementally, ourselves."

Another area of expected cost savings is redundancy. Perkins+Will has been studying the Continuous Cluster Replication (CCR) feature in Exchange Server 2007, especially in a graphically dispersed cluster. CCR provides robust failover functionality. More importantly, because Exchange Server 2007 hosts both e-mail and voice mail in a single inbox, there is no need to set up separate failover configurations for e-mail and voice mail. "We think we will have the ability to introduce redundancy at a lower cost with this solution compared to a PBX voice-mail system," notes Fait.

Perkins+Will also expects to reduce costs by consolidating the eight servers currently running Exchange Server 2003 onto the three 64-bit servers supporting Exchange Server 2007.

### **Enables Greater Efficiency**

The universal inbox made possible by unified messaging allows for increased efficiency. "Unified messaging has made it much easier to keep up with all my different methods of communication," says Fait. "I used to dial into my voice-mail system and hear I had 16 new messages, and had no idea whether they were critical or not. It sometimes took a long time listening to the messages, taking notes, and deleting the messages. I was less inclined to be responsive to voice-mail messages when I traveled, because they

tended to be out of sight and therefore out of mind. Today, I'm more inclined to listen and respond to voice-mail messages than I was before."

Nitzsche concurs. "Voice mail is the last thing I check when I'm on the road or out of the office. Now I have some visibility into the voice-messaging space from the environment I'm in the most—and that's e-mail."

"The other benefit of our new unified messaging solution is its ability to identify who a message is from up front so I can make better use of my time," continues Fait. "There are certain numbers that I can tell right away are sales calls, so I can choose to deal with them right away or not. Another big benefit is that I can listen to a message I've been waiting for right away, instead of having to listen to 20 minutes of messages from other people first."

Perkins+Will expects to further boost efficiency when it incorporates cell-phone services into the unified messaging solution. "We're looking at strategies right now for merging our cell-phone mailboxes so that people have a single mailbox for all of their messaging," explains Nitzsche.

### **Simplifies System Administration**

Relying on a PBX voice-mail system requires additional expertise and administrative tools. Conversely, the unified messaging environment on Exchange Server 2007 makes use of the company's existing knowledge base and Microsoft system management tools such as Operations Manager.

"Once we overcame the initial challenges of deploying the system," says Fait, "our unified messaging solution has been rock solid. The members of our infrastructure team have found it much easier to understand than our PBX system. Exchange Server 2007 is

transparent and built on industry standards, so we don't need to call a consultant whenever we encounter even the smallest of problems. I give a lot of credit to Forrest McDuffie at PLA for his explanation of how our new system works so we can monitor for, and troubleshoot, any issues."

#### **Boosts Collaboration**

Unlike PBX voice-mail systems that offer a single service, unified messaging provides for multiple communication and collaboration services. The Exchange Server unified messaging solution is comprehensive, so companies do not have to purchase additional third-party tools or licenses to implement features like speech or fax over IP. Exchange Server is also compatible with numerous PBX systems, so companies can extend existing investments.

In addition, the Exchange Server unified messaging solution is part of the larger communication and collaboration vision from Microsoft, delivered in the Enterprise CAL Suite. Deploying Exchange Server 2007 and unified messaging was one step toward realizing this vision. Perkins+Will has taken other steps as well by deploying System Center Operations Manager 2007 and Microsoft Forefront™ Security for Exchange Server. Over the next two years, the company will be deploying Microsoft Office Communications Server 2007, Office SharePoint Server 2007, Microsoft System Center Configuration Manager 2007, and Windows® Rights Management Services.

"Convergence is the key driver behind our migration to Exchange Server 2007," concludes Nitzsche. "Because that means there are fewer moving parts to deal with, and employees can focus more on their work and less on their computing environment. We're looking for simplification, so we can make life better for our employees. And we're looking for value, meaning more functionality,

better ease of use, and less cost. By deploying the Enterprise CAL Suite, we get more choices and a lot of other benefits—and that's where the value really starts to show itself."

## 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)

For more information about Project Leadership Associates products and services, call (312) 441-0077 or visit the Web site at: [www.projectleadership.net](http://www.projectleadership.net)

For more information about Enabling Technologies products and services, call (800) 923-4310 or visit the Web site at: [www.enablingtechcorp.com](http://www.enablingtechcorp.com)

For more information about Perkins+Will products and services, call (312) 755-0770 or visit the Web site at: [www.perkinswill.com](http://www.perkinswill.com)

## Microsoft Server Product Portfolio

For more information about the Microsoft server product portfolio, go to: [www.microsoft.com/servers](http://www.microsoft.com/servers)

For more information about Microsoft Exchange Server, go to: [www.microsoft.com/exchange](http://www.microsoft.com/exchange)

### Software and Services

- Microsoft Server Product Portfolio
  - Windows Server 2003 R2 Enterprise x64 Edition
  - Microsoft Exchange Server 2007 Enterprise Edition
  - Microsoft System Center Operations Manager 2007
- Microsoft Office
  - Microsoft Office Outlook 2007
  - Microsoft Office Professional 2007

### Technologies

- Active Directory
- Microsoft Office Outlook Web Access
- Windows PowerShell

### Hardware

- 3 IBM x3650 rack-mount server computers
- Dialogic 2030 Media Gateway

### Partners

- Project Leadership Associates
- Enabling Technologies



### Communication and Collaboration Solutions

**Project Leadership Associates** has worked with several customers to envision, plan and deploy the technologies that encompass the Microsoft Unified Communications solutions including Microsoft Exchange Server, Office Communications Server and the Windows Mobile platform. These solutions can have a direct impact on the productivity of an organization's employees, allowing them to collaborate more effectively from any device and from anywhere in the world. Increased productivity has resulted in a communication and collaboration platform that has a direct impact on revenue and customer satisfaction by allowing employees to find, collaborate and share information with the right people.

Project Leadership Associates is offering a **FREE one on one briefing** to outline the solutions that encompass Microsoft Unified Communications. These solutions include Microsoft Exchange 2007 with Unified Messaging and Office Communications Server.

To take advantage of this free offer contact Don Penland at [dpenland@projectleadership.net](mailto:dpenland@projectleadership.net) or phone (312) 441-1953