



Law Firm Provides Disaster Recovery While Reducing Costs with E-mail Upgrade

Overview

Country or Region: United States

Industry: Professional services—Legal services

Customer Profile

Law firm Katten Muchin Rosenman LLP has over 600 attorneys in locations across the United States and an affiliate in London. Its practice areas include corporate, financial services, litigation, and real estate.

Business Situation

To provide disaster recovery and address challenges with e-mail retention, Katten wanted to provide a highly available messaging environment that eased regulatory compliance.

Solution

Katten deployed Microsoft® Exchange Server 2010 to take advantage of improved compliance capabilities and to reduce e-mail downtime.

Benefits

- Less e-mail downtime
- Decreased compliance costs
- Reduced storage costs
- Reduced IT administration

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Katten Muchin Rosenman LLP offers legal counsel in 40 different areas of practice, including corporate, financial services, litigation, real estate, and commercial finance. E-mail is a critical communication tool for its 1,350 employees—650 attorneys and 700 administrative and support staff—who work in offices across the United States and in an affiliate in London. Katten wanted to improve site resiliency to avoid extended e-mail system outages that were imposed by property management at their buildings for electrical and HVAC maintenance. Working with Microsoft® Gold Certified Partner Project Leadership Associates, Katten deployed Microsoft Exchange Server 2010 to provide a highly available messaging environment that supported the compliance requirements of legal communications. The firm expects high e-mail availability, savings in storage costs, and a decrease in compliance costs.



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Situation

Founded in 1974, Katten Muchin Rosenman LLP employs 650 attorneys who provide an extensive range of legal services across numerous industries. The firm’s clients include one-third of the Fortune 100, as well as a number of government and nonprofit organizations and individuals.

Katten depends on secure and effective communication between attorneys and clients. Alexander Diaz, Enterprise Development Manager at Katten Muchin Rosenman LLP, says, “As a law firm, e-mail is one of the critical applications that we can’t live without.” Maximizing e-mail availability at Katten is important to help maintain a high level of client service and reduce response time for critical inquiries.

The firm was using Microsoft® Exchange Server 2003, and employees accessed e-mail through the Microsoft Office Outlook® 2003 messaging and collaboration client. The company had e-mail servers in its Chicago office and five other locations. Each site used a two-node cluster for high availability, but there was no replication of data among the sites. Diaz says, “Some sites, such as Los Angeles, face brownouts as well as scheduled electrical outages. So we might have a complete system outage at a given site, which directly impacts business in those locations. They can still work on local documents, but e-mail is down for them.” Katten had begun using servers at a co-location facility to store a redundant copy of their litigation practice data and wanted to be able to use that site to provide disaster recovery for e-mail as well.

Without a robust disaster-recovery solution in place, Katten could only provide e-mail users with a brand-new

mailbox on an alternative server via a third-party hosted service until their regular firm-provided e-mail service could be restored. However, this presented several issues around access and security. First, a new mailbox without data did not enable attorneys to continue working effectively, which precluded the ability to provide good client service. Second, when a work e-mail mailbox was down, an attorney might be tempted to use personal e-mail for urgent communication instead of waiting for IT to provision a new mailbox, putting sensitive legal information at risk. Diaz says, “Downtime costs us a lot in productivity, so redundancy is very important for the firm. The attorneys need access to e-mail to continue providing timely services to their clients.”

Since mailbox sizes at Katten average approximately 30 gigabytes (GB), a lot of storage is required. Katten uses a storage area network (SAN) storage system with fiber channel disks and redundant array of inexpensive disks (RAID) 10 redundancy for storage. This system is expensive but necessary to provide the performance the firm requires in its Exchange Server 2003 environment. “The vast majority of our mobile devices are BlackBerry. They are so I/O [input/output] intensive that it requires the need to be on fast disks to minimize the impact,” explains Diaz. The large mailbox sizes also affected the performance of the Office Outlook 2003 client. Attorneys complained that starting Outlook could take as long as five minutes, and Katten was looking for a way to improve performance.

As a law firm, Katten has stringent compliance, security, and litigation requirements. Diaz says, “We struggled with litigation holds. There have been times we needed to be able to search

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across multiple mailboxes, which was not easy in the previous environment. IT should be able to offload these tasks to the conflicts and records departments.”

Solution

To investigate a way to resolve its e-mail performance, storage, and compliance issues, Katten decided to participate in the Rapid Deployment Program for Microsoft Exchange Server 2010. With the help of Microsoft Gold Certified Partner Project Leadership Associates, Katten began testing Exchange Server 2010 in April 2009 and found that the solution was just what it was looking for. “Exchange Server 2010 has increased our ability to provide our customers with a very flexible and reliable messaging infrastructure,” explains Forrest McDuffie, Senior Consultant with Project Leadership Associates. “Exchange Server 2010 enables us to provide these options more cost effectively than we could with previous versions of Exchange Server.”

A key Exchange Server 2010 capability that has helped improve resiliency for Katten is Database Availability Groups. Database Availability Groups combines on-site and off-site data replication into a single high-availability solution that helps protect its Exchange Server environment from downtime. Using Database Availability Groups, Katten can implement high-availability and disaster-recovery solutions for each office so that employees will not face interruptions in service even if their sites experience a planned outage. Diaz says, “We will have a redundant copy within each site and a replicated copy at the co-location facility. With Exchange Server 2010, the failover is seamless.”

All Internet mail will be routed through two Hub Transport servers running

Microsoft Forefront™ Protection 2010 for Exchange Server. These servers will perform antivirus checks on all e-mail traffic destined in or out of the firm. In order to provide redundancy for external e-mail this role will have a redundant counterpart at the firm’s co-location site.

With Database Availability Groups resolving its high-availability and disaster-recovery needs, Katten began looking at the other capabilities Exchange Server 2010 could provide. With Exchange Server 2010, Katten administrators and compliance officers with the correct permissions can now use the Exchange Control Panel to perform multi-mailbox searches for items such as messages, attachments, contacts, or calendar entries. During conflict searches or litigation investigations, administrators can save the search results to a specified mailbox or store them for further investigation.

Katten also will take advantage of improved retention policies in Exchange Server 2010 to help satisfy corporate policy requirements on communications. Administrators can apply retention or expiration settings to specific items or folders in a mailbox, at an organizational or user level. The administrator configures the policies, which are displayed inside each e-mail, along with a header message describing the policy that has been applied. These headers make it easier for employees to identify when an e-mail is set for expiration and move it to another folder if they need to retain it beyond the expiration policy. Katten also plans to use Information Rights Management to help safeguard sensitive information.

With Role Based Access Control (RBAC), Katten can delegate Exchange Server 2010 administration capabilities by

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creating specialty roles with predetermined functions. Diaz says, "We found RBAC to be a huge benefit. That is something I have needed for a long time—to have more granular rights for administrators and lower-level IT staff to do targeted tasks. Today we have a lot of low-level administrators who execute mailbox moves or perform other Exchange Server related administrative tasks. Previous versions of Exchange Server would require giving them full Exchange Server administrator rights to perform some of these routine tasks. Now we can easily provide the help desk additional access to create or modify distribution lists—some of the routine tasks that would otherwise burden your more experienced Exchange Server administrators."

The firm will take advantage of the 90-percent reduction in disk input/output (I/O) compared to Exchange Server 2003, by reducing the cost of the storage it uses on its SAN. "We'll be able to use less expensive disks for the redundant copy at each site and in the co-location. We will use SATA [Serial Advanced Technology Attachment] instead of fiber channel disks and will also use RAID 5 instead of RAID 10 for the secondary copies," says Diaz. The use of RAID 5 will reduce the amount of storage needed to help protect against hardware or site failures.

Attorneys at Katten will benefit from some of the new user capabilities provided by Exchange Server 2010. The Conversation View is useful because it collapses the conversation and can even pull together messages that have been saved in different folders. Diaz says, "Let's say you are out of the office and you get ten e-mails on the same thread. Before, you would spend time looking for the end of the thread. With Exchange

Server 2010 even when someone breaks the conversation, the conversation view maintains the thread and brings an otherwise disjointed conversation back in line." He continues, "I also really like the new user interface in Outlook 2010. One of my favorite features is QuickSteps. With QuickSteps, I can easily automate some of the actions that I do frequently."

Katten has been testing the client performance of Outlook 2010 along with the Windows® 7 operating system. "Regarding performance, if you are running 64-bit Windows 7, it is blazingly fast. Microsoft did a bang-up job with these products. Performance with large mailboxes greatly exceeds our expectations. With the growing amount of data that needs to be retained, it is not uncommon for us to have 30-gigabyte plus mailboxes, making these performance improvements crucial to our business. I have been using Exchange Server 2010 and Outlook 2010 for e-mail since June and have been extremely satisfied with the performance and the user experience. It is a robust, very stable platform," says Diaz.

Katten also would like to increase the number of employees using Windows phones with Windows Mobile® 6.5 to reduce the I/O impact and security concerns of mobile devices accessing mail on its e-mail servers. Diaz says, "We are trying to expand the use of Windows phones and would like to expand the use of Microsoft Exchange ActiveSync® technology. During the development of our new Exchange Server 2010 environment we have also been testing the features and functionality of Windows Mobile 6.5. Overall, the experience has been nicer on Windows Mobile 6.5 than experienced on previous versions. The phones are receiving e-mail as quickly as it shows up on the mailbox

server. It is almost instantaneous.” Windows Mobile 6.5 also delivers many of the same new features included in Outlook 2010 and Outlook Web App, providing a consistent user experience across the clients.

Benefits

With its deployment of Exchange Server 2010, Katten looks forward to several benefits that will improve its attorneys’ ability to serve clients. The firm expects less e-mail downtime, decreased compliance costs, reduced storage costs, and reduced administrative time.

Reduced E-mail Downtime

Diaz says, “The main goal for the Exchange Server 2010 deployment is to provide high-availability and business continuity functionality.” He continues, “With Exchange Server 2010, failover is seamless.” With improvements enabled by the use of Database Availability Groups to provide site redundancy at its co-location facility, Katten attorneys can continue to use e-mail without interruption, making them more responsive to client needs and enabling them to meet critical deadlines.

Decreased Compliance Costs

With Exchange Server 2010, Katten is reducing the time and cost of e-mail and records compliance. With the Exchange Control Panel for multi-mailbox searches and RBAC, compliance officers and administrators can better track, investigate, and manage the communications related to litigation holds. The time spent on compliance activities related to e-mail will decrease, reducing the need for IT involvement. With improved rights management and retention policies, the firm will enhance the ability to protect its intellectual property.

Reduced Storage Costs

With the upgrade to Exchange Server 2010, Katten will use less expensive storage for redundant copies of the data while maintaining similar performance to the primary copy. Diaz says, “Our storage costs for e-mail will be considerably less. The number of disks in the RAID sets will be much greater, with 1-terabyte drives in a RAID 5 configuration providing more available storage. With RAID 10, we used up a lot of disks. Exchange Server 2010 eliminates the need to use more costly storage configurations.”

Reduced IT Administration

With Exchange Server 2010, IT can safely delegate many of the less complex administrative tasks such as distribution lists or mailbox moves to the help desk personnel or less experienced IT staff. More experienced administrators would then be free to spend additional time resolving complex support issues. Thanks to Exchange Server 2010, Katten administrators can move mailboxes between databases without taking users offline. Employees will be happy because they can continue to send and receive mail without interruption, and IT administrators will appreciate the ability to perform mailbox moves during normal business hours.

“With the help of Project Leadership Associates, Katten has created a unified communications environment that helps to improve the quality and reliability of its e-mail platform for its attorneys and support staff. This solution will provide the firm with improved client servicing and productivity,” says Diaz.

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 in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. 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

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

For more information about Katten Muchin Rosenman LLP products and services, call (312) 902-5200 or visit the Web site at:
www.kattenlaw.com

Microsoft Exchange Server 2010

Exchange Server 2010 can help you achieve better business outcomes while controlling the costs of deployment, administration, and compliance. Exchange Server delivers the widest range of deployment options, integrated information leakage protection, and advanced compliance capabilities, which combine to form the best messaging and collaboration solution available.

For more information about Microsoft Exchange Server 2010, go to:
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