

# Office 365: Stone Age to 21st Century in One Giant Leap

### About Robeco

Robeco is the first major financial services provider in the Netherlands to adopt Office 365. In comparison to the firm's previous IT situation, management and operational costs have significantly fallen, while satisfaction levels and productivity among employees have risen. "One of our employees described the introduction of Office 365 like going from Stone Age to 21st Century in a single, giant leap," says Ton Ligtoet of Robeco. "That gives you an idea of just how far we've come in a space of less than two years. From a situation where we were on the back foot, we're now considered an early adopter in the financial services sector. What's more, the opportunities offered by our new IT system are endless: we're still only scraping the surface..."

### Situation

In 2012, the asset management firm launched the You! initiative; an internal initiative geared towards its New Ways of Working program. With "Bricks, Bytes & Behavior" as its core concepts, You! encompasses change in the areas of accommodation, technology and behaviors: how to work together, how to share knowledge, and how to use communication tools more effectively and efficiently.

As far as the technological aspect was concerned, Robeco faced an uphill struggle, with a relatively antiquated IT system currently in place. "The goal of New Ways of Working was to enable our people to work more efficiently, communicate, and collaborate at optimal levels. This proved nigh on impossible with our existing IT infrastructure, which consisted of Office XP, Lotus Notes and Windows XP. Our users weren't especially happy with that environment," comments Ton Ligtoet, IT Development Manager and the member of the IT management team responsible for commissioning the "Workspace 2014" workplace program.

The associated business case was focused on achieving a breakthrough to support New Ways of Working and reduce costs. Ligtoet: "What we were looking for was a solution that would benefit both our users and our IT department. Office 365 ticked these boxes for us. Office 365 has a flexible license model, with the advantage that the most significant costs relate to the number of users as opposed to the number of servers, storage and licenses. Of course the operational costs don't disappear altogether. Tweaks and adjustments to your own infrastructure will

## ROBECO

The Investment Engineers

always be necessary to allow for the integration of Office 365 and to achieve adequate security levels. In addition, there will be more competencies within the new IT set-up than previously. Still, the change has meant that our IT department can focus more on the application of IT, and less on the IT itself. Furthermore, the new set of tools puts us in a better position to facilitate communication, collaboration and knowledge sharing — leading in turn to improved productivity. Another advantage of the Office 365 environment is greater user satisfaction. Having carried out a number of reference visits to customers of both Google and Microsoft, the company's decision to go with Microsoft 365 was made pretty quickly. "One of the key reasons we opted for Microsoft was because we felt Microsoft technology was a better fit for our needs, wishes and vision. Another contributing factor was that Office 365 involves adopting in-house applications that are likely to already be familiar to our users, such as Outlook Online."

Ligtvoet suggests that there were more than enough arguments in favor of Office 365 to convince the management:

"With factors such as cost-savings, user experience and an always up-to-date IT environment, this wasn't too tough a task. A number of other aspects played a more significant role in the final decision-making process, such as security, privacy, compliance and the specifications of regulators. We worked closely with Microsoft and our IT partner in these areas."

Avanade, a Microsoft Certified Partner, was selected as their partner. Ligtvoet: "Avanade has a wealth of experience with Microsoft technology and BPOS, the forerunner to Office 365, and has countless similar projects under its belt. The experts at Avanade understand the tricks of the trade and they deliver quality." We also worked closely with HP, our outsourcing partner for infrastructure, workplace management and the service desk.

#### **Solution**

Robeco employs more than 1600 people, and 1200 of them are already working with Office 365, not only within the Netherlands, but also at a number of sales offices in Asia, the Middle East and Europe. That makes Robeco the first of the major financial institutions to make the move to Office 365 on this sort of scale.

"Because we're among the first in financial services to start to work with this Microsoft solution, we did come up against a few unanticipated hurdles during the initial phases. These have since been overcome by Microsoft and Avanade but, looking back, we definitely learned from them," says Johann Corlemeijer, Vice President of Technical Infrastructure at Avanade.

"One of Robeco's challenges revolved around compliance and security regulations. In theory, Office 365 is a "one-size-fits-all" solution, meaning that each customer has the same functionality at their disposal. But Robeco is not just any customer. Compared with other customers, security requirements are more stringent and compliance specifications have to be fulfilled, as required by the regulator, De Nederlandsche Bank (DNB). Last November, this regulator removed a significant barrier to the use of Microsoft Office 365. In agreement with Dutch financial institutions such as Robeco, Microsoft incorporated a clause in this regard, which grants the DNB the right to investigation. As such, the DNB is entitled to conduct investigations into Robeco's regulatory compliance within the Office 365 environment." "This doesn't mean that a financial institution is relieved of its duty to carry out a thorough risk analysis and risk assessment prior to introducing Office 365, whilst also observing the DNB rules on outsourcing," adds Ligtvoet.

In terms of compliance and security, the necessary safeguards are integrated into Office 365 in the form of legal hold and device control, to name just two. Johann Corlemeijer explains: "A Robeco employee can access their data at any given moment, with any device, and at any given place, so long as that device is authorized. This type of provision makes Office 365 the best solution for Robeco; not only from a technological point of view, but also from a user perspective." Within the Office 365 cloud, users have access to Exchange Online, SharePoint Online and Lync Online. Robeco uses Exchange Online to handle email and calendars; SharePoint Online replaces the Intranet and offers the option of sharing sites and files with other parties.

#### **Advantages**

"The greatest advantage of Office 365 for us is the ability to have a single, modern environment that integrates mail, calendar and Office functionalities," says Ligtvoet. "We now also have the tools available to share our knowledge and facilitate collaboration. And, as we predicted, costs have dropped. Microsoft automatically updates our Office 365 environment, adding new functionalities that our end users can enjoy instantaneously."

Ligtvoet also lists ease of use, broad functionality, increased collaboration within his organization, and the option to use smartphones as additional benefits. "Partly thanks to the introduction of webmail and the option of accessing mail, calendar, communication and collaboration functionalities



"Having consulted external advisors and carried out a number of reference visits to Google and Microsoft customers, the decision was pretty easy: the Microsoft Office 365 cloud solution."

**- Ton Ligtvoet**  
*IT Development Manager and Robeco  
Workspace commissioner*

via both business smartphones and personal devices, (primarily iPhones and iPads in Robeco's case), we are improving basic IT support; be it at work and home, on a business or personal device."

Cost reductions formed a large part of the business case. Corlemeijer: "Large or small, one mailbox, 25,000 mailboxes or more, Office 365 is suited to any organization. Costly customization is no longer required, nor is maintenance and service; these are all taken care of by Microsoft. As a result, the Office 365 option is significantly less expensive than 'on premises' solutions on in-house servers."

Ligtvoet: "I can't give exact percentages or figures relating to the cost savings. But what I will say is that the maintenance and operational costs relating to an Office 365 environment are significantly lower than those for the server we had in place previously. The fact that Microsoft takes care of management, security and updates saves us a lot of time and work. The impact of Office 365 on productivity is equally impressive. We hadn't included this factor in the business case or tried to quantify its effect, but the results we're seeing are good."

*"As far as compliance and security with Office 365 are concerned, all the necessary measures are integrated."*

**- Ton Ligtvoet**  
*IT Development Manager and Robeco Workspace commissioner*

The new IT system aside, this also has to do with the changes we've introduced to accommodation and the way in which staff are reacting to these same changes."

Looking ahead, Robeco intends to explore the functionalities of Office 365 in more depth. Ligtvoet: "Things like integrating Lync and office telephone systems. Lync introduces a whole new way of communicating that goes far beyond simply making a call, and makes expensive telephone centers obsolete. In the meantime, Microsoft is introducing new functionalities on a regular basis. We're always curious to see how they can help us!"

Ligtvoet indicates that a number of other financial institutions are now showing a great deal of interest in Robeco's Office 365 solution: "We've pioneered this in our field. Now everyone else is keen to find out how we did it and what our experience has been. It's been a positive one; we've taken the first steps towards New Ways of Working, and we seem to be on the right path with Office 365."

#### **Office 365**

Office 365 is ideal for businesses looking to have overall access to email, familiar Office programs, web meetings and file sharing. For a small fee per user per month, you can access your email and documents from almost anywhere, as well as being able to create, save and edit files using online versions of familiar Office software. Document sharing, web meetings, an Intranet and a website—everything is included.

*"With Office 365, place and time no longer represent restrictions."*

**- Ton Ligtvoet**  
*IT Development Manager and Robeco Workspace commissioner*



*"Costly customization is no longer required, nor is maintenance and service; these are all taken care of by Microsoft. This means that the cloud solution is more economical."*

**- Johann Corlemeijer**  
*Vice President of Technical Infrastructure at Avande*



Avanade offers business technology solutions that connect insight, innovation and expertise in Microsoft technologies to help customers achieve the desired results. [www.avanade.nl](http://www.avanade.nl)

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