



Real Estate Investment Firm Achieves Vision Through Infrastructure Optimization

Overview

Country or Region: United States

Industry: Real estate

Customer Profile

Founded in 1971, Guardian Management LLC owns and manages real estate in seven western states. Based in Portland, Oregon, the company has 500 employees.

Business Situation

Guardian wanted to expand its business and enter new markets, and do so without increasing its employee base—but its outdated technology was holding the company back.

Solution

The company underwent a comprehensive optimization of its core infrastructure and its business-productivity infrastructure.

Benefits

- Helps realize business vision
- Contributes to business growth without employee increase
- Enables collaboration across a growing geographic region
- Boosts e-mail productivity 20 percent
- Saves IT 40 person-hours per month

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Will Wilson, Director of Information Systems, Guardian Management LLC

Guardian Management LLC had a clear vision for its business: shift its emphasis from real estate management to real estate investment, expand throughout more of the western United States, and do so without adding employees. But Guardian’s technology infrastructure didn’t support these goals. So, the company embarked on a comprehensive infrastructure optimization.

Decentralized systems have been centralized; standard technologies and practices have been deployed; and new solutions have been introduced for collaboration. The infrastructure is more available and reliable—and the IT department saves 40 hours per month in maintenance time, which it invests in designing and deploying solutions that fuel continued business growth. The changes have helped the company to increase its investment portfolio by 30 percent and its geographic reach from five states to seven—without adding employees.

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Situation

Three years ago, Guardian Management LLC had an ambitious vision for its business. The third-generation real estate management and investment company, based in Portland, Oregon, wanted to shift its emphasis from property management to property ownership, expanding into the potentially more-profitable area of real estate investment. The company wanted to increase the size of the buildings it managed and owned. It wanted to expand geographically as well, moving beyond a handful of states to become a force throughout most of the western United States. And it wanted to achieve this growth without increasing the number of people it employed.

But its technology infrastructure stood in the way.

The company had 500 employees but only a handful of laptops; the vast majority of Guardian employees worked the traditional way, at their desks. And their desktop computers ran on a mixture of aging Microsoft® operating systems, from Windows® 95 to Windows 98. On the server side, the company ran on a series of computers based on the Windows 2000 Server operating system. Data, according to one executive, was stored “all over the place,” without a centralized structure. The 50-gigabyte Microsoft Exchange 2000 Server e-mail system was nearing capacity. Virus attacks had to be cleaned up approximately every six months. Hundreds of unsolicited commercial e-mail messages, or “spam,” clogged employee mailboxes every day, dragging down productivity while filling up the e-mail stores.

This system was managed by a part-time contractor who kept the desktop and server computers in operation. All the computers were maintained manually, with the contractor having to visit each machine to

install new or updated software, including antivirus software. As a result, machines generally went without the latest updates for weeks or more at a time.

“The company knew it needed to upgrade its technology, but the idea was to continually adopt newer versions of the software it had been running,” says Will Wilson, Director of Information Systems, Guardian Management LLC. “The company wasn’t focused on the options for using technology in new ways to support the business. There was a sense that technology should help the business—but there was no plan for how to achieve that.”

Although management wasn’t sure how to revamp its technology infrastructure, it came to realize that a restructuring was needed if Guardian were to grow into new businesses and new geographic markets, and if it were to do so by increasing the productivity of its current staff. That’s when the company hired Wilson as a full-time technology director to replace the part-time contractor.

Wilson had his mandate from management to optimize the technology infrastructure of Guardian Management. The question was: where to begin?

Solution

With so many fires to fight, Wilson began with what he viewed as the most immediate concern: the e-mail environment.

Stabilizing the E-Mail Environment

“The Exchange Server system was about to reach its capacity,” recalls Wilson. “If that happened, the system would shut down, setting us back tremendously. E-mail was a business-critical function. We had to ensure it worked properly.”

And that meant more than just adding mailbox capacity. Wilson upgraded the environment to Exchange Server 2003 to

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take advantage of the newer software’s greater capacity and more efficient use of server space. He did more, moving e-mail storage to a centralized storage-area network (SAN) device that would ensure faster, more reliable backups of the business-critical data than were possible with the previous tape-based backup solution, as well as provide a scalable structure for expanded storage as needed. Tape was still used, as a second-tier backup, ensuring a higher level of disaster recovery. And to help make sure that the unbridled growth of the previous e-mail system wouldn’t be repeated, Wilson created storage limits on mailboxes, administered through the Exchange Server software.

But undisciplined use of e-mail had been only one of many threats facing the Exchange Server system; other threats were from viruses and spam. To address them, Wilson replaced the ineffective antivirus solution with Sybari Antigen—now, Microsoft Forefront™ Security for Exchange Server—which also doubled as Guardian’s first antispam solution.

The five simultaneous antivirus scanning engines in Forefront Security for Exchange Server, together with the software’s ability to block suspicious file-type attachments such as executable (.exe) files, eliminated the virus infections that had previously plagued the company. Meanwhile, the antispam engine in Forefront Security for Exchange Server “reduced our spam overnight,” says Wilson. “We went from hundreds of spams in each mailbox each day to virtually zero.”

Addressing Core Infrastructure Needs

With the all-important e-mail system stabilized, Wilson went on to address other core infrastructure needs of the company. The SAN solution serving the e-mail system doubled as a centralized storage solution for the company’s other data, replacing the previous, haphazard server-based storage

systems. The network was upgraded as well, secured with new firewalls and enhanced with virtual private networking (VPN) technology that enabled remote network access. And to give employees a way to take advantage of that remote access, the company added laptops to its computing mix. The result was that employees could be increasingly productive by accessing network resources from home or while traveling.

More recently, Wilson has begun to move Guardian to a more cost-effective and simpler remote access model, replacing the VPN with Internet-based access solutions such as Microsoft Office Outlook® Web Access that enable employees to connect to Guardian from any Web-based device.

The next set of core infrastructure enhancements concerned the ways in which Wilson and his lean IT department managed the evolving infrastructure. The manual, high-touch system of updating computers was replaced by a highly automated series of solutions designed ultimately to increase system availability and reliability while reducing the time and cost needed to do so. Microsoft Software Update Services was adopted to enable automatic deployment of updates for Windows to all desktops overnight or as needed during the day.

Microsoft Operations Manager 2005—and now Microsoft System Center Operations Manager 2007—monitors an increasing range of the Guardian environment, including Exchange Server, Microsoft SQL Server™ 2005 database software, Microsoft Live Communications Server 2005, the Active Directory® directory service, and Domain Name Service. Guardian’s new technology components reinforce each other in other ways as well.

For example, the company has also deployed Microsoft Forefront Client Security to

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safeguard its desktops and laptops. Updates to that software are distributed and deployed automatically by Software Update Services, relieving Wilson and his staff of the need to manage that new software manually.

Guardian had been using Active Directory in the Windows Server® operating system prior to the company’s core infrastructure optimization, but not often. Its use was limited to establishing user accounts. With the technology overhaul, Guardian expanded the use of Active Directory by adopting Group Policies to customize and automate the deployment of applications and updates to specific users and groups of users. It also used Active Directory to enforce strong passwords, which further enhanced the security of the infrastructure.

Optimizing the Infrastructure for Business Productivity

To make it easier to adopt all of this new software and to reduce the associated costs and complexity of licensing, Guardian adopted a Microsoft Enterprise Agreement for volume licensing. Earlier, Guardian had begun a business relationship with Ascentium, a Microsoft Gold Certified Partner. Now, Guardian and Ascentium planned an entirely new level of infrastructure optimization: that of the business-productivity environment in which Guardian’s employees worked.

That optimization of the business-productivity infrastructure has focused on bringing the benefits of unified communications to Guardian through technologies that include Exchange Server 2007, the 2007 Microsoft Office system (Guardian is in the process of migrating from Office 2003), Microsoft Office Live Communications Server 2005, and the Microsoft Office Live Meeting service. The company is also testing Microsoft Office Communications Server 2007. Together, these technologies give Guardian employees

a single interface through which they can communicate with their colleagues and others using whatever technology or combination of technologies is best for a given communication—instant messaging, phone, voicemail, e-mail, or Web conferencing.

Beyond unified communications, Guardian and Ascentium are working together on new ways for Guardian employees to collaborate. A proof of concept for Microsoft Office SharePoint® Server 2007 is a first step toward giving Guardian employees a single place to store, share, and collaborate on documents, and toward maximizing the effectiveness of that collaboration with automated workflows, which were not possible when people were storing documents in file shares and distributing them through e-mail.

Another proof of concept is introducing Guardian to Microsoft Dynamics™ CRM to help manage customer relationships. The solution builds on the Office Outlook 2007 messaging and collaboration client, which Guardian employees already know and use. That choice eliminates the need to train employees on a new software interface while delivering a powerful new way to track and share information on the owners, investors, lenders, and other external contacts that employees need to cultivate.

Looking ahead, Wilson envisions deploying Microsoft Dynamics CRM across the enterprise and taking advantage of its automated workflows to manage marketing campaigns and other programs. Data from those campaigns will then flow automatically into Microsoft Office Excel® 2007 spreadsheet software for analysis, with the information accessed and shared by employees through the Office SharePoint Server portal.

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Benefits

The continuing infrastructure optimization at Guardian has already delivered dividends, both for the company’s business users and for the technology professionals who support them.

Helping to Turn Business Vision into Business Reality

“Before we embarked on this optimization of our infrastructure, our technology was holding us back from achieving our vision for the company,” says Wilson. “Now, technology is helping to make that vision a reality.”

For example, Guardian has expanded its operations from five western states to seven, and its real estate investment portfolio has grown by 30 percent—and that’s happened without any significant addition to its approximately 500 employees.

“Thanks to the technology, we’re working smarter, not harder,” says Wilson. “We work when and where we want to and need to—not when and where the technology allows us to.”

Increasing Collaboration Despite Geography

Some of that improvement comes from increased office productivity; without hundreds of spams to wade through each day, Guardian employees work with e-mail 20 percent faster.

Wilson also points to the new communication and collaboration technologies, which enable employees on the road or in remote offices to interact with their colleagues in Portland as though they were down the hall.

“We have people traveling to southern Oregon, to Washington, to Texas,” he says. “They share documents and files and review them together in Web conferencing sessions as though they were seated at the same conference table. We couldn’t do that

before—which means we had no cost-effective way to expand into these regions before.”

Even Portland-based employees are more productive, being able to respond to critical issues when they need to—not when they’re able to get back to the office to check their e-mail and access relevant resources. That’s been a crucial enabler of closing deals successfully as the company has expanded into real estate ownership.

When a recent snowstorm shut down most of Portland, Guardian employees used their remote access and unified communications to maintain work with each other and their outside contacts, carrying on the vast majority of their business. Three years earlier, Wilson says, a Portland snowstorm would have seen Guardian employees, like most of their neighbors, waiting for the city snowplows to come through.

Freeing IT to Deliver Business Value

The infrastructure optimization has also had a profound impact on Wilson and his colleagues in IT, relieving them of the responsibility to react to crisis after crisis, and freeing them to plan and manage the technology solutions that are driving Guardian’s increasing success.

For example, Wilson estimates that simply deploying Software Update Services saves him 30 hours per month in manual updates and reboots of computers in the company’s Portland office. It also means that those updates happen much faster than they otherwise would, contributing to greater uptime and reliability.

“Windows XP Service Pack 2 was a very important update—and also a very big one,” says Wilson. “I don’t know when we would have found the time to ‘babysit’ its deployment at each computer. But because

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Similarly, Microsoft Operations Manager notifies Wilson and his colleagues of potential problems before users can be affected by system crashes or other issues. If Wilson and his staff had to check the status of their 20 servers manually to determine system status, he estimates that would likely take an additional 10 hours per month.

"We now have an infrastructure that works the way it should," says Wilson. "That means we can focus on using technology to deliver the greatest value to the business. The solutions we're piloting will deliver unprecedented value—and enable Guardian's continued business growth."

Microsoft Server Product Portfolio

For more information about the Microsoft server product portfolio, go to: www.microsoft.com/servers/default.mspx

Software and Services

- Microsoft Server Product Portfolio
 - Windows Server 2003
 - Microsoft Exchange Server 2007
 - Microsoft Forefront Client Security
 - Microsoft Forefront Security for Exchange Server
 - Microsoft System Center Operations Manager 2007
 - Microsoft SQL Server 2005
- Microsoft Office
 - Microsoft Office Professional 2007
 - Microsoft Office Professional Edition 2003
 - Microsoft Office SharePoint Server 2007
 - Microsoft Office Live Communications Server 2005

- Microsoft Dynamics
 - Microsoft Dynamics CRM
- Technologies
 - Active Directory
 - Microsoft Office Outlook Web Access
 - Microsoft Software Update Services

Hardware

- Dell PowerEdge computers

Partner

- Ascentium