



Case Study: Leveraging O365 to Standardized Email Platform

Getting Technical: How one HVAC company with a dozen branches transitioned from its complex email platform to an appropriate hosted solution with minimal disruption of service.

Client Profile:

- Hoffman & Hoffman
- Greensboro, NC
- www.hoffman-hoffman.com
- Dedicated to meeting the heating, filtration, ventilation, and air conditioning needs of engineers, owners, and contractors
- 350 employees

Executive Summary

Since 1947, Hoffman & Hoffman Inc. has been dedicated to meeting the heating, filtration, ventilation, and air conditioning needs of engineers, owners, and contractors.

TCS helped by:

- Transitioning Hoffman & Hoffman's fragmented email network to O365 without down time
- Streamlining the home office and twelve branches for a more organized way to email, while enjoying access to a variety of Office applications
- Retaining the functionality of local mail server with the reliability and robustness of a hosted solution

Client Challenges

Hoffman and Hoffman had four major operational issues related to how they used email throughout the company. First, their organization had a corporate office and twelve branches that lacked any standardization between their email platforms. Second, to maintain these different platforms, Hoffman and Hoffman was either going to consolidate to one platform or incur ever growing expenses to maintain the different platforms. The third major concern was the security of critical email data. There was a question with all the different platforms as to where and who had access to the saved email. The final issue was the desire to improve the utilization of all the features within Microsoft Outlook, i.e. calendar and contact sharing. Hoffman and Hoffman was also concerned with how a project of this size spread over so many locations could be accomplished without impacting user's ability to access email.

TCS discussed these issues with Hoffman and Hoffman and created a plan to implement O365 into their environment as the one and only email platform. In 2016 Microsoft O365 had a 99.98% uptime record and this was reassuring for Hoffman & Hoffman. In addition, the O365 product provides all the end users with the full functionality of Outlook including calendar and contact sharing. With the O365 platform, Hoffman and Hoffman can work with one set of security standards and provide each employee with a mailbox with plenty of storage to minimize lost emails. Because TCS is a certified Microsoft partner with extensive experience doing email migrations, the migrations were conducted live, so that all employees could communicate via email during the entire

migration with the only down time being a single reboot of their PC.

Mike Story, the Microsoft Exchange Manager, discussed that many employees were hesitant to transition email platforms: “[It] works just fine; don’t change anything”. Mike finished by stating, “...technological change is not easy for a lot of people,” but he knew a uniform email platform migration would be most effective for their company, so the decision was made to proceed.

How TCS Helped

TCS used a Cloud based O365 email migration process to improve all the issues that Hoffman & Hoffman previously suffered from. TCS migrated the on premise server in multiple stages to O365. During the phases of this transition, Hoffman & Hoffman’s email stayed live without any down time during the project.

TCS upgraded and standardized Hoffman & Hoffman overall email communications and gave them access to convenient applications such as universal distribution lists, shared calendars, Skype for business, and web versions of Office apps.

Email backups that were previously a challenge are automated and the Cloud has the capacity to store emails indefinitely. Mike Story stated this aspect of O365 has already been useful for their company, “we don’t have to worry about backups on our Exchange Server, it was becoming a headache.”

Another benefit is the admin portal, which allows Mike to retrieve email easily from any location and for any user without

having to spend nearly as much time or energy as before the migration.

“I’m not saying the change for my users was easy, but it was not as hard as it could have been. Some training was involved for employees to learn the platform” said Mike Story reflecting on the entire process.

Results, Return on Investment and Future

Specific Results:

- A more organized email solution
- Access to a variety of Office applications
- Less effort required to back up emails
- Much easier to retrieve lost or deleted emails through the admin portal

Mike Story and the rest of Hoffman & Hoffman are continuing to learn about the capabilities they have in O365. Though Mike admitted some employees are “old school and reluctant to move away from the obsolete versions,” he finds the collaboration tools and the global address book to be beneficial to their company, “we are collaborating and seeing the benefit.” The next step for the company is to leverage those new applications by teaching more employees about them and incorporating those features into their daily work.

“I have been a proponent of outsourcing IT. IT vendors have exposure to a wide variety of challenges, products, services, and tools that in-house IT may not be aware of because they [in-house IT] focus on their own business, not all the changes happening in the IT industry,” Mike Story.

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