

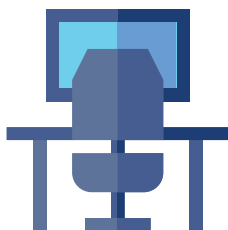
# Nero Blanco Helps HSBC Improve Productivity and Enterprise Mobility Globally by Building and Supporting Email Migration Systems

**Nero Blanco partners with HSBC** to migrate more than **270,000 mailboxes** to deliver improved collaboration

## EXECUTIVE SUMMARY

As one of the world's largest banking and financial organisations, HSBC has over 4,000 offices around the world. This far-reaching and agile company requires innovative and reliable technology in order for colleagues to connect, collaborate, and communicate with one another and with customers. After relying on IBM Notes (formerly IBM Lotus Notes) for nearly 15 years, HSBC recognised the need to upgrade to a more current solution to improve productivity and meet the demands of a modern workforce. After careful evaluation, HSBC selected Binary Tree for its migration coexistence capabilities and partnered with Nero Blanco through Microsoft and HPE Pointnext to migrate more than 270,000 mailboxes worldwide, leveraging the expertise and specialist skillset of Nero Blanco services to build a tailored, robust, secure, high velocity solution, and to support the migration capability and coexistence of users and applications worldwide.

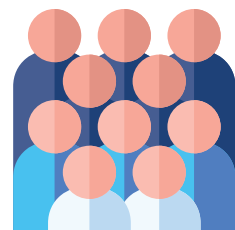
With more than 45 million customers across 65 countries and territories in Europe, Asia, the Middle East and Africa, North America and Latin America, HSBC is one of the largest banking and financial services organisations in the world. Operating four global businesses – Retail Banking and Wealth Management, Commercial Banking, Global Banking and Markets, and Global Private Banking – HSBC colleagues around the world needed to be able to connect, communicate, and collaborate easily and effectively in order to remain productive, provide excellent customer care, and achieve core business objectives.



**4,000**  
OFFICES WORLDWIDE



**270,000**  
MAILBOXES



**45,000,000**  
CUSTOMERS WORLDWIDE

## EXECUTIVE SUMMARY **Cont'd**

HSBC had relied on IBM Notes for email, but was beginning to find this legacy email tool problematic. New employees found the outdated system to have a steep learning curve, sometimes taking up to two days to completely on board onto IBM Notes. Support was also proving to be a challenge for IBM Notes, and it didn't provide the kind of collaborative environment the HSBC global community required.

The bank knew it wanted to deliver a set of innovate technology tools and capabilities to transform how colleagues connect, communicate, and collaborate across HSBC. It also wanted an email infrastructure that was easier to use and support, and would better work within HSBC's agile environment while helping the company achieve its core objectives and improve business operations.

According to Kieren Mills, Global Head of Collaboration Technology, HSBC, "We developed our vision and wanted to select a new solution that enabled increased productivity and ease-of-use through a familiar interface so we could evolve toward a more collaborative and efficient organisation."

## EVALUATING GLOBAL MIGRATION OPTIONS

During its evaluation process, management at HSBC knew what it wanted in a new solution, and what it didn't. "We got feedback from all of our lines of business that they were frustrated with using Notes. Most of our new hires had never even heard of Notes. We needed an intuitive and easy-to-use email system that would enable enhanced messaging, remove the learning curve associated with Notes and eliminate the daily time loss caused by everybody having to file their email every business day," says Mills.

Ultimately, HSBC selected solutions from Microsoft® as appropriate replacements. "We saw the business benefits in deploying Microsoft Exchange Server® and Microsoft Outlook® client software to replace our aging IBM Notes infrastructure," says Mills. "We were on the verge of either refreshing IBM Notes or investing in an alternative messaging solution, and we decided to make a transformative move to a Microsoft solution."

While HSBC explored and evaluated cloud- based solutions, the global bank concluded it would be preferable to deploy Microsoft Exchange servers worldwide. According to Mills, "We saw the advantages in cloud-based solutions, but preferred to gain the operational and security advantages of deploying and managing Microsoft Exchange in our offices worldwide."

Prior to rolling out the new system across the company, HSBC with Nero Blanco conducted an extensive production-pilot program and proof of concept to demonstrate the value of migrating from IBM Notes to Microsoft Exchange and Microsoft Outlook. Nero Blanco worked with HSBC to develop and customise the Binary Tree products to meet HSBC's stringent demands. Nero Blanco successfully completed the proof of concept by integrating globally into the live environment without the associated production impacting risks, following which management decided to proceed with this global workforce productivity initiative.

"Once we proved the practicality of this enterprise migration, we evaluated global partners that could help us minimize migration risk while driving this global upgrade," states Mills.

## EVALUATING GLOBAL MIGRATION OPTIONS Cont'd

It became apparent that Nero Blanco would be the right partner on this project because of their extensive knowledge and capability of the Binary Tree toolset and Microsoft Exchange and Outlook. HSBC selected Binary Tree tools and Nero Blanco consultants to help design and implement the global migration and coexistence capability.

## ENABLING GLOBAL WORKPLACE PRODUCTIVITY

Nero Blanco worked closely with HSBC and Binary Tree to develop a migration capability based on deploying a star topology worldwide in HSBC data centres, and introduced best practices that have been adopted by HSBC. Once the packaged solution was defined for light, medium, and heavy workloads, Australia and New Zealand were selected as the pilot locations. After the success of this regional implementation, global deployment planning was initiated.

“We have migrated over 270,000 mailbox accounts for our colleagues, including about 10,000 shared mailboxes”, says David Bollington, Global Head of Workplace Technologies. “We have deployed over 400 HP ProLiant DL380 Servers running Microsoft Exchange Server. We’ve also completed upgrading approximately 70,000 mobile devices to benefit from our new communications and collaboration infrastructure.”

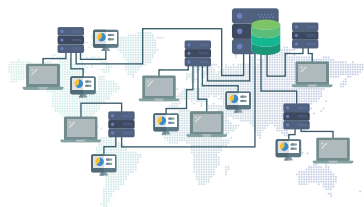
Nero Blanco customised the migration solution to simultaneously operate numerous Binary Tree Notes Migrator farms (formerly CMT for Exchange) globally from a single management dashboard, all executing with a least privilege access model to ensure HSBC’s stringent security requirements were met. 12 farms and over 259 Notes Migrator workers were dispersed across 7 countries and centrally controlled to achieve a velocity of 57,000 migrations per month and up to 4,000 per night, migrating 26 countries in parallel.

20 Domino Notes Integrator (formerly BT CMT for Coexistence) servers and an additional 12 servers for free busy were deployed across Hong Kong, UK and India. These at their peak supported 217 million emails in a single month across the 67 countries

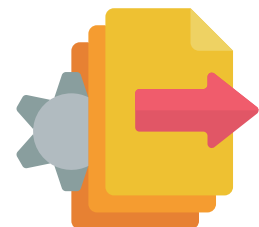
The business was impressed with the migration and how little the change impacted the day to day activities. The technical design approach and business change preparations together ensured a smooth transition. Feedback from business units reflected the enormous success and positive feedback on the transformation experience.



**12**  
MIGRATOR FARMS



**259**  
MIGRATOR WORKERS



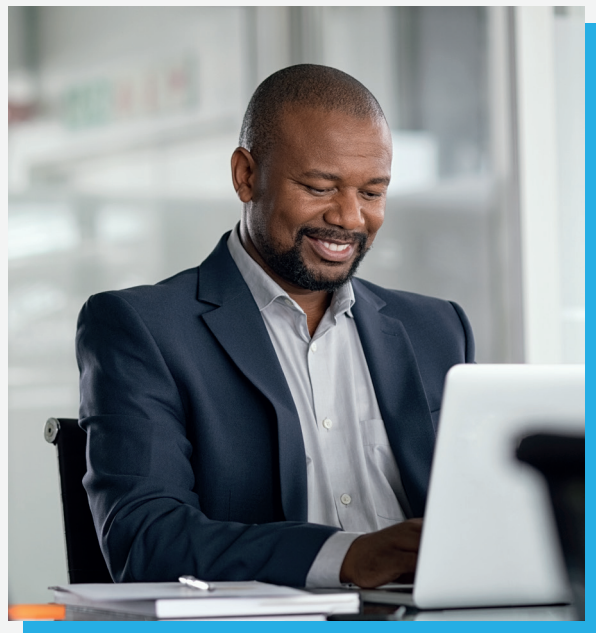
**57,000**  
MIGRATIONS / MONTH

## A RISE IN PRODUCTIVITY

HSBC has increased both individual and organisational productivity through more efficient workflows, and has dramatically improved communication and collaboration across the organisation. “This migration has become incredibly popular within HSBC because it resolves the enterprise-wide frustration of managing communications on the limited Notes platform,” states Mills. “Microsoft Exchange eliminates quota restrictions so that users can now easily accept a 50 MB email file. Outlook has been a major improvement over the way we used to do business, and there have been no protests by users preferring the Notes environment because all our colleagues are welcoming this migration.”

Microsoft Outlook serves as the interface to the new communications and collaboration infrastructure, and HSBC has virtually eliminated the heavy training requirements previously necessary for IBM Notes as most users are already familiar with Outlook and Microsoft’s similar look and feel across productivity applications.

Executives can now delegate authority to allow assistants to update calendars, which was not possible with Notes. Users can view the presence of their colleagues, which facilitates collaboration and scheduling, a huge advantage over the previous system which struggled in the offering and accepting of email invitations to meetings. “Notes was an older platform and did not efficiently support email invites, but Microsoft Exchange and Outlook eliminate this problem,” says Mills.



Along with fully automating the migration, Nero Blanco worked closely with Binary Tree and HSBC to develop new features and functionality in the coexistence user experience, further reducing the functionality gaps between Outlook and Notes. Some of these features introduced included being able to exchange highly restricted and confidential email between the platforms seamlessly.

“The migration to Outlook is helping us attract and retain new talent, which was an ongoing problem when recruits heard about the limitations of our Notes deployment. This is particularly true for attracting millennials who grew up with Microsoft interfaces and used Microsoft products throughout their college careers.”

HSBC, Nero Blanco, HPE Pointnext and Binary Tree will complete the global migration over the coming months with the remaining highly regulated countries requiring secure segregated solutions. Business units at HSBC locations that have not yet been migrated are anxious to move away from Notes to Microsoft Exchange and Microsoft Outlook. “Our colleagues welcome the ability to easily access information from their computers, tablets, and phones, and it is a joy to work on a global IT program that has such a large pull from our end user community,” explains Mills.

**A RISE IN PRODUCTIVITY** Cont'd

He concludes, "I believe HSBC was the largest Notes installation outside of IBM before we began our migration, and Nero Blanco, HPE Pointnext and Binary Tree continue to help us drive this upgrade across our organisation with an exceptional colleague experience. We are not only improving workforce productivity today, we are also setting the stage for greater adoption of mobile technology and a rapid evolution of the collaborative platform in the future. We are transforming our workplace by providing our colleagues across the organisation with powerful and easy-to-use tools for communications and collaboration. Nero Blanco consultants provided their expertise to help us through this massive email migration change as well as the behavioural perspective of this transformation."



I believe HSBC was the largest Notes installation outside of IBM before we began our migration, and Nero Blanco, HPE Pointnext and Binary Tree continue to help us drive this upgrade across our organisation with an exceptional colleague experience. We are not only improving workforce productivity today, we are also setting the stage for greater adoption of mobile technology and a rapid evolution of the collaborative platform in the future. We are transforming our workplace by providing our colleagues across the organisation with powerful and easy-to-use tools for communications and collaboration. Nero Blanco consultants provided their expertise to help us through this massive email migration change as well as the behavioural perspective of this transformation."



**Kieren Mills**, Global Head of Collaboration Technology, HSBC



ARTICLE APPROVED BY

**David Bollington**

GLOBAL HEAD OF COLLABORATION TECHNOLOGY  
**HSBC**

## About Nero Blanco

Nero Blanco IT Limited was formed in 2012 by highly skilled and experienced independent contractors. We want to help organisations with mixed IT environments to make a seamless transition to the latest technology.

We help and are trusted by organisations of varying sizes (50 users through to 270,000 users) on their Cloud journey; the industries we help are varied from Not for Profits, Utilities, Advertising Agencies through to Global Finance.

Our expert team can help companies like yours to easily migrate from the old to the new. For us, no two projects are the same. We take a new perspective for every project we work on. Our solutions are tailored to fit your challenges, whilst keeping in mind cost, efficiency and maintaining a highly personal level of support.

We relish the challenge of making your migration as smooth and painless as possible. Our goal is the timely delivery of an end-to-end technology solution that will dramatically improve your performance results.



**CONRAD  
MURRAY**



**TWAN  
VAN BEERS**



**NEIL  
LANGSTON**

### GET IN TOUCH

You can call us on **+44 20 3880 2299** or email [Team@neroblanc.co.uk](mailto:Team@neroblanc.co.uk)

**Follow us on Twitter:** [@NeroBlancoIT](https://twitter.com/NeroBlancoIT)

**Like our page on Facebook:** [facebook.com/neroblancoit](https://facebook.com/neroblancoit)

**Connect on LinkedIn:** [linkedin.com/nero-blanco-it](https://linkedin.com/nero-blanco-it)

### WE HOLD THE FOLLOWING ACCREDITATIONS:



Gold Cloud Platform  
Gold Cloud Productivity  
Gold Enterprise Mobility Management  
Silver Small and Midmarket Cloud Solutions  
Silver Messaging



**Crown Commercial Service**  
management information system online