

Quest Software achieves seamless collaboration with newly acquired colleagues in hours, not days

The Challenge

The success of a corporate merger depends to a large degree on how quickly the two entities can start conducting business as one. Jon Arcilla, supervisor of Systems Administration at Quest Software, and his team were challenged to implement a collaboration solution for more than 2,100 employees in 17 countries across three different Exchange organizations within days of a corporate acquisition.

With the acquisition of Aelita Software, Quest was prepared to create contacts in each company's existing Exchange organization by doing directory exports and imports. This would create a complete global address list (GAL) on both sides, but only for that snapshot in time. Long-term maintenance would require repeating this manual process over and over. Moreover, employees would not see free/busy information until the Information Technology (IT) department was able to migrate users into a single Active Directory forest.

"We could make synchronization happen, but the time and labor involved would impact future IT projects as the companies integrated," Arcilla said. "The ability to immediately provide free/busy information and global address lists to end users gives the IT department some breathing room to evaluate and plan what the new Active Directory/Exchange environment will look like."

In addition, management was concerned about employees, who tend to experience stress during corporate acquisitions. Employees would naturally be anxious to start working together as one company, but without a synchronized GAL they would be hindered by a lack of information. Unsure of new names, job titles, and e-mail addresses, they would have to make several phone calls or send multiple e-mails just to determine available meeting times - assuming they could even determine who should be included in meetings. Reducing that initial stress on employees was crucial to the harmonious blending of the company.

What Quest needed was a solution that would minimize frustration and distraction, enabling employees to stay focused on the business opportunities at hand. They discovered that not only was it possible to synchronize free/busy information and GALs between multiple Exchange organizations, but it was possible to do it in hours, not days.

The Quest Solution

Planning - 9 March 2004

Quest found the solution to its Microsoft Exchange synchronization challenges in one of the products it was gaining in the acquisition: Aelita® Collaboration Services™ for Exchange.

Quest assembled a synchronization team of IT administrators from both Quest and Aelita. They quickly established that Collaboration Services would be able to provide automated synchronization and eliminate manual tasks for both IT departments. The product would do more than just synchronize the GAL; it would also provide free/busy information to users in both organizations. The morning after the acquisition, employees would be able to see the names of their new team members and quickly schedule meetings using their existing Outlook client. No end-user training was needed—an added bonus the integration team liked.

"In about an hour, the team was able to outline an integration plan to synchronize data on the very first day of the acquisition," said Steve Dickson, Vice President of Quest's Windows

Overview

"Collaboration Services integrated our sales and product development groups within hours of the acquisition. From day one, we were able to work as a team to win sales and align our products."

Steve Dickson
Vice President Windows Management
Quest Software

ROI

- Reduced employee stress by providing collaboration via Microsoft Outlook within hours of the acquisition
- Increased efficiency for scheduling meetings by providing synchronized free/busy information
- Maximized productivity for all employees by providing a synchronized GAL including details in Microsoft Outlook properties
- Eliminated manual synchronization tasks that Exchange administrators would have to repeat to maintain an up-to-date GAL

Benefits

- Synchronized free/busy information and the GAL in less than seven hours
- Synchronized Exchange organizations without merging Active Directory forests
- Synchronized both free/busy information and the GAL with one product
- Automated synchronization tasks for Exchange administrators

Environment

- Quest: One Active Directory Forest/One Exchange organization; approximately 2,000 users and 1,100 groups
- Aelita: Two Active Directory Forests/Two Exchange organizations; approximately 500 users and 20 groups



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The flexibility of Collaboration Services appealed to the team because it allowed each of the administrators to determine how the synchronized data would be displayed in their Exchange organization. Display mappers were used to synchronize key Aelita groups as contacts in the Quest GAL. The team also decided to add a suffix onto the Quest distribution lists as they were synchronized into the Aelita GAL. This would allow employees on both sides to easily see which entries in their address book were new. Once the groups were synchronized, IT administrators would be able to nest distribution lists and provide employees with a comprehensive method for communicating with everyone in their new groups. As Aelita IT administrators created @quest.com e-mail aliases for Aelita employees, Collaboration Services would synchronize the attribute into Quest's GAL.

Testing – 12 March 2004

Before the merger, Aelita was already using Collaboration Services to synchronize its two existing Exchange organizations. During the Quest integration, it was determined that Aelita's Columbus office would act as the headquarters for the synchronization, while Quest and the second Aelita Exchange organization would be synchronized as branches.

"It took us less than an hour to install Collaboration Services and establish synchronization with a test collection of users," Arcilla said. "We broke for lunch and when we returned, our test users appeared in both address lists with free/busy information appearing in calendars. It was that easy."

Security was a major concern for the integration. It would take weeks to implement consistent security policies across the far-flung new corporate infrastructure. Quest needed a secure solution that would provide flexibility for administration while maintaining the high-level of security dictated by company policy.

Again, Collaboration Services came to the rescue. Using signed, encrypted Simple Mail Transfer Protocol (SMTP) to transfer synchronization data, Quest was able to avoid opening ports, establishing trusts, or sharing administrative accounts between the Exchange organizations. Settings could be customized in each Active Directory forest so the flow of synchronization data did not impact normal e-mail traffic.

With Collaboration Services, Quest was able to put information at employees' fingertips. The GAL included all user attributes in accordance with Quest's policies. Not only were employees able to see e-mail addresses of their new team members in the address book, they could quickly find locations, telephone numbers, and organization structure using the properties stored in Active Directory and viewable through Outlook.

Using themselves as test subjects, the synchronization team was the first to reap the benefits of Collaboration Services. Instead of trading cell phone numbers and e-mail addresses over the telephone, they used Outlook to send status messages to the entire project team. In fact, the free/busy information now synchronized in their Outlook calendars made it easy to schedule the actual implementation meeting for the evening of 17 March.

Implementation –17 March 2004

As the ink was drying on the signed legal documents, Quest's synchronization team got busy. At 8:12 PM PT, the team reviewed the synchronization settings established in the initial planning meeting less than two weeks earlier. By 8:30 PM PT, the team confirmed everything was ready and enabled the synchronization for the main collection of users. The initial synchronization would take a couple of hours to complete with just over 3,600 objects to transfer. With full confidence in Collaboration Services, the synchronization team went home. Their part was completed. Collaboration Services would handle the rest.

Acquisition Announcements – 18 March 2004

As Quest employees arrived at work on the morning of 18 March, they were greeted by two things. The first was an announcement that the acquisition of Aelita Software was completed. The second was an up-to-date address book containing contact and free/busy information for every Quest employee, both new and old.

In just six hours, the synchronization team planned and implemented Collaboration Services. "This product eliminated hours of manually exporting and importing global address lists between Exchange organizations," said Arcilla. "By noon on March 18, we declared the synchronization project a success and moved on to planning long-term IT goals."

"It was tremendously helpful to see our new colleagues in the address book right away," said Dickson. "We could immediately verify name spellings, locations, and other details. If we heard a name mentioned casually in a meeting, we could easily look them up and contact that person for follow-up. We avoided a lot of wasted time and really felt more like a single team."

The Bottom Line

Ultimately, Quest will be migrating Aelita employees into its Active Directory/Exchange infrastructure. As employees are migrated into the new Exchange organizations, Collaboration Services will assist with the cleanup process. Collaboration Services will automatically delete synchronization data at the proper time so that Quest can maintain a clean Exchange environment long-term with little to no daily maintenance by IT administrators.

"We were proud to see our product work so well to benefit our own company, and feel that our experience with it gives us even more motivation to tell customers and prospects about what it can do for them," Dickson said.

"Our deployment of Collaboration Services within hours of the acquisition demonstrates how our solution sets maintain the availability and security of critical Microsoft systems - in this case, Exchange. It empowered Quest and Aelita to unite as one company immediately," said Carol Fawcett, vice president of Information Services. "And that's a great first step toward a successful acquisition. One more point on this: Collaboration Services provided us with the ability to provide a seamless, integrated application for one of the most important and widely-used applications to a company, Microsoft Outlook."

About Quest Software

Quest Software, Inc., a leader in application management, provides software for Application Confidence to 18,000 customers worldwide, including 75 percent of the Fortune 500. Quest products for application performance management, database management, and Microsoft infrastructure management help customers develop, deploy, manage, and maintain enterprise applications without expensive downtime or business interruption. Headquartered in Irvine, Calif., Quest Software can be found in offices around the globe and at www.quest.com.

About Quest Windows Management

Quest Software provides solutions that simplify, automate and secure Active Directory, Exchange, and Windows environments. The Quest Windows Management group delivers comprehensive capabilities for secure Windows management and migration. For more information on Quest Software's Windows Management group, please visit <http://www.quest.com/microsoft>.