

**Objective**

Replace and evolve an aging set of collaboration tools to improve productivity and enhance user efficiency and collaboration.

Approach

Engage [HPE Pointnext](#) to leverage their expertise and established best practices in order to migrate and successfully transition the global HSBC workforce to a new email platform.

IT Matters

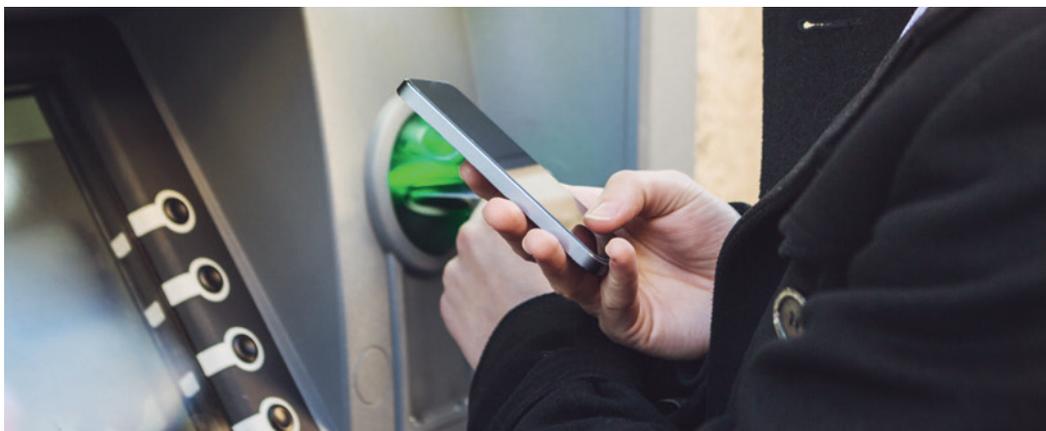
- Deliver greater value from existing collaboration tooling within HSBC through integration and ease of use
- Reduce the support overhead by replacing a bespoke HSBC email system with an industry recognized out of the box solution
- Provide possibilities for further innovation due to the changes in an aging technology stack

Business Matters

- Transitioned workforce from IBM Notes to Microsoft Exchange with an approach that focuses on both behavioral changes as well as technical changes
- Minimized impact to customers
- Mitigated risk in a complex and highly regulated sector

HPE helps HSBC improve productivity enterprise mobility globally by migrating email systems

HPE 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 organizations, 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 recognized the need to upgrade to a more current solution to improve productivity and meet the demands of a modern workforce. After careful evaluation, HSBC partnered with HPE Pointnext to migrate more than 270,000 mailboxes worldwide, leveraging HPE Management of Change services designed to help prepare and support people through technology tools change, with minimal disruption and risk.

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 organizations 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.

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

“We are transforming our workplace by providing our colleagues across the organization with powerful and easy-to-use tools for communications and collaboration. HPE Pointnext consultants provided their expertise to help us through the massive email migration aspect as well as the behavioural perspective of this transformation.”

– Kieren Mills, Global Head of Collaboration Technology, HSBC

curve, sometimes taking up to two days to completely onboard 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 Kieran 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 organization.”

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 conducted an extensive pilot program and proof of concept to demonstrate the value of migrating from IBM Notes to Microsoft Exchange and Microsoft Outlook. The bank worked closely with HPE partner and enterprise migration firm Binary Tree to successfully complete the proof of concept, at which point 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.

It became apparent that HPE Pointnext would be the right partner on this project because of its approach to transitioning both the tools and the people within the organization. HSBC selected HPE Workplace and Mobility Services and HPE Management of Change Services to help design and implement the global migration.

“We found that HPE had completed more migrations than any other company in the world with over 30 million mailboxes already migrated for enterprise customers. HPE Pointnext showed us the depth of expertise to manage this migration, and offered the global coverage we required.”

Enabling global workplace productivity

In order to accomplish a smooth transition from both a technology perspective and an adoption perspective, HSBC prioritized the migration by recruiting a program director to run the project codenamed ‘Mercury’ internally. The bank adopted a “planticipation” strategy to ensure a successful and seamless transition. This strategy fit well with their selection of HPE Management of Change Services, which is designed to address key obstacles to behavior change in the workplace, a requirement for achieving success with the adoption of new technology.

“HPE Pointnext helped us develop and define migration policies and procedures that could scale worldwide and allow us to minimize our migration risk,” says Mills.

Together, HPE and HSBC managed the information security, regulatory, and operational risks associated with such a large-scale migration within a tight timeframe and without any unplanned internal or external service interruptions. The implementation team also focused on changing colleague behaviors through training and communications, rather than treating the migration as a strictly technology-driven project.

HPE Pointnext worked closely with HSBC and Binary Tree to develop a phased migration based on deploying HPE ProLiant DL380

Servers worldwide in HSBC data centers and offices, and shared best practices that have been adopted by HSBC. Once configurations of the Exchange servers were defined for light, medium, and heavy workloads, they were first deployed in HSBC offices throughout Australia and New Zealand. After the success of this regional implementation, the global deployment was initiated.

Microsoft SharePoint was gradually deployed to enable enhanced document collaboration, and HSBC purchased licenses for Microsoft Office productivity software. In less than seven months, over 100,000 HSBC colleagues have gone through the Management of Change transition and migrated from IBM Notes to Microsoft Outlook and Microsoft Exchange.

“We will migrate in total over 270,000 mailbox accounts for our colleagues, as well as about 50,000 shared mailboxes”, says Mills. “We have already deployed about 170 HPE ProLiant DL380 Servers running Microsoft Exchange Server, and ultimately we’ll scale up to about 400 servers when we complete the migration. We’ve also already completed upgrading approximately 65,000 mobile devices to benefit from our new communications and collaboration infrastructure.”

Transitioning through training

“A critical success factor in the migration project included the need to train and transition HSBC colleagues in offices all over the globe,” says Mills. Working closely with HSBC’s project Mercury team, HPE Management of Change Services were effective in facilitating training to help prepare HSBC colleagues for the change with information about what to expect and how it would affect them. This included identifying and delivering training to distinct audiences, such as executive and personal assistants, and creating a global network of 1,200 change champions and 4,200 super-users.

HPE Pointnext also provided global training to HSBC using techniques and methodologies which are proven to enable new technology adoption with minimal disruption in an environment tolerating zero downtime. HPE Desktop Mentor helped to reinforce skills with HSBC colleagues right from their desktops.

Customer at a glance

HPE Pointnext services

- HPE Workplace and Mobility Services
- HPE Management of Change Services

Hardware

- HPE ProLiant DL380 servers

This training coincided with project Mercury's internal awareness program, which included the creation of the highly visual "My Upgrade" brand which ran in 10 languages, touching colleagues worldwide.

The HPE Delegate Analyzer helped identify particular groups of colleagues who communicate and collaborate together on a regular basis, both within and across country boundaries, which meant that these groups could be switched over to Outlook in the same migration window. As such, 26 countries were migrated simultaneously with Delegate Analyzer grouping colleagues in a way that minimized operational disruption, achieving both a groundbreaking pace and quality of delivery. At its peak, 4,300 mailboxes were migrated over one night, and 57,885 were migrated over a single month.

A rise in productivity

HSBC has increased both individual and organizational productivity through more efficient workflows, and has dramatically improved communication and collaboration across the organization. "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."

HSBC now regularly uses video calling within the bank and with its customers, and has become a heavy user of video conferencing. 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.

"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, HPE and Binary Tree will complete the global migration over the coming months, and those business units at HSBC locations throughout the world that have not yet been migrated are anxious to move away from Notes and 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.

He concludes, "I believe HSBC was the largest Notes installation outside of IBM before we began our migration, and HPE Pointnext and Binary Tree continue to help us drive this upgrade across our organization 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."

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