DELIVERING OFFICE PRODUCTIVITY

CDW PEOPLE WHO GET IT™

Worth Beacham and Charles Pope say Coastal Beverage's IT staff previously spent a lot of time managing and maintaining its Exchange mail server before moving to the cloud.

Coastal Beverage turns to CDW for help in implementing Office 365 and empowering mobile users.

At a Glance

COMPANY: Coastal Beverage

LOCATION: Wilmington, N.C.

NUMBER OF EMPLOYEES: 385

FULL–TIME I.T. STAFF: 3

SUMMARY: Founded in 1959, this family–owned premium beer distributorship serves more than 5,000 grocery stores, convenience stores and other retail customers in 38 eastern North Carolina counties. It has offices in Elizabeth City, Farmville, Pollocksville and Wilmington.

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For more than 50 years, Coastal Beverage, a premium beer distributorship based in Wilmington, N.C., has grown and thrived because of its willingness to adapt and embrace innovative ways of doing business.

That adaptability extends to Coastal Beverage's IT operations. When the IT team in 2014 realized the extent to which Microsoft Exchange was weighing down its on-premises computing environment, they knew the time had come for a critical decision: Either significantly invest in server and storage upgrades to accommodate the next version of Exchange and other Microsoft productivity tools, or choose a new and better path. They opted for the latter and turned to the cloud.

"From just about every perspective, Exchange was taking up most of our resources," recalls Charlie Pope, IT/IS manager for Coastal Beverage, which has four locations but just three people supporting IT functions. "It was the biggest consumer of our storage space, processing power, network bandwidth and time. We spent a lot of effort managing it, making sure it had all the proper updates, validating backups and making sure we had a good disaster recovery plan in place," he says. "It was getting to be overwhelming and drove us to finally consider the cloud."

Another factor was the fact that the sales-driven organization has a large percentage of mobile personnel. "The traditional Office tools were a big hurdle for our salespeople trying to use tablets and smartphones because the mobile operating systems gave them limited

resources for document functionality," says Worth Beacham, IT support technician at Coastal Beverage. "They had to do a lot of work-arounds using third-party software to share documents with our in-office staff or call in to get needed information. That was all very time-consuming and sometimes frustrating."

After consulting with its longtime IT vendor, CDW, the IT team decided to implement Microsoft Office 365. First released in 2013, this cloud-based solution provides users with online access to the familiar suite of Microsoft Office applications, including Word, Excel, PowerPoint, SharePoint and Exchange. Office 365 also enables integrated access to other collaboration and communication services, including Skype and Yammer (an internal social media tool), and provides built-in online storage using Microsoft OneDrive.

The different applications and related files are hosted in Microsoft's online cloud environment and managed by Microsoft personnel. CDW implemented the new solution and migrated all users and company data to the cloud.

A monthly cloud subscription enabled Coastal Beverage to avoid an estimated $150,000 in capital expenditures and licensing fees and another $30,000 in recurring operating costs over three years. In addition, reliance on the cloud has freed up 400 gigabytes of precious data center storage, while mobile users now have access to the same application versions that onsite staff use.

"It wasn't without a few snags here and there, but all and all it went very smoothly," says Pope. "The IT department is spending less time managing Exchange and less time trying to balance our resources, and our users are gaining time and productivity. It's exactly as we hoped it would be."

Preparation and Migration

Although Coastal Beverage had been purchasing equipment from CDW for several years, the Office 365 project was the first major services engagement between the two companies. From the start, says Pope, "you could tell that CDW brought a lot of experience. They were well organized and planned everything out and executed extremely well."

Jaime Navarro, Microsoft professional services manager for CDW, recalls that his team arrived last September to kick off the initiative, which began with an in-depth assessment of Coastal Beverage's existing environment and business needs. "We went through design and planning sessions until we determined what the end-state environment was going to be and what the migration plan was going to be," he says. "Their IT team was extremely knowledgeable about the existing environment, and they brought the right people in to make informed decisions.

92%

of SMBs now use at least one cloud business solution, and 87% use at least one cloud infrastructure solution.

SOURCE: SMB Group, "Top 10 SMB Technology Trends for 2015," January 2015

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Experience Matters

Implementing Office 365 isn't a "'next, next, finish' type of Microsoft deployment, where you pop in a disk and run through a wizard," explains Jeremy Silber, technical lead for CDW. "There are a lot of moving parts and a lot of steps to make this work out successfully."

CDW has migrated more seats to Office 365 than any other Microsoft vendor, so Coastal Beverage gained the benefit of all that experience. Here are some best practices that ensured a successful implementation:

- **Get end-user input up front.** During the planning and design phase, CDW typically brings in key personnel from different user groups and departments to learn how they currently work and what their needs are in the new applications. This step helps ensure user buy-in and confidence in the new system, says Jaime Navarro, Microsoft professional services manager for CDW. "It's important to communicate with users along the way and provide training, so it's a smooth and, ultimately, successful transition."

- **Avoid any and all bumps.** Although moving productivity tools from on-premises servers to the cloud seems like a mere matter of geography, anticipate and mitigate problems so the changeover goes as smoothly as possible. "Things do work a little differently in the cloud, so if there's difficulty in migrating users to the cloud, they might decide they don't want to adopt it and that they don't want to use it," Navarro says. "So even though you get them eventually migrated to the cloud, there will be this perception of it as a failure, and you won't get as much out of it as you could."

- **Make it a team effort.** Although Coastal Beverage hired CDW to perform the implementation and migration services, the company's IT team remained closely involved in the effort. Not only did that help everyone make the most informed decisions along the way, but also CDW could begin transferring knowledge from the start, and Coastal Beverage's IT personnel were fully prepared to take over maintenance and user support as soon as the deployment was complete.

When you get that kind of interaction from the client, it ends up being, overall, a more successful engagement."

Still, Coastal Beverage, which has nearly 400 employees and 700 computing devices, came into the project with one inherent challenge to successfully utilizing a cloud-based solution: bandwidth.

The company's sales and service area spans highly rural eastern North Carolina. As a result, two branches lacked robust Internet capacity. The Farmville site, which has the most users, was particularly challenged because it has access to only one Internet service provider and relatively slow digital subscriber line connectivity.

Coastal Beverage's Beacham says that the company has been able to get around those limitations in the past by leveraging its wide area network and rerouting Farmville data traffic through its Wilmington headquarters site when necessary.

In anticipation of the added demands that cloud utilization would bring, the IT team concurrently planned to upgrade a fiber line between Farmville and Wilmington from 10 megabits per second to 20Mbps to augment bandwidth speeds. Beacham adds that the recent arrival of new ISP in the area will soon provide additional Internet capacity and negate the need to reroute traffic as frequently during periods of high use.

Another concern was the split deployment of Microsoft Lync, a next-generation unified conferencing and messaging system. The company uses an on-premises version of Lync for enterprise telephony. However, the implementation of Office 365 required Lync's automated attendant and voicemail capture functionality to move to the cloud, where it could be managed as part of Exchange.

The IT team was especially concerned about messaging functionality, which needed to continue to be of the highest quality to communicate with customers, says CDW Technical Lead Jeremy Silber, who oversaw the integration between the on-premises and cloud components of Lync.

"They wanted to take it slowly, rather than shift everything and move at once," Silber recalls. "So we took time to replicate and test and make sure that everything worked as expected and delivered the same quality of service as the on-premises infrastructure before we slowly began migrating the services into the cloud."

Cloud Rising

Once CDW and Coastal Beverage completed the planning stage, CDW set up the Office 365 tenant in the Microsoft cloud, built a hybrid server and began migrating 250 user accounts and data to the cloud.

The company's bandwidth came into play at that point, says Navarro. "They had very little dedicated Internet to the environment, and there was a lot of data to move, but it wasn't a major problem. We just extended the number of migration days we would need."

In fact, Beacham says the slower pace was actually a positive. The IT team was able to use that time to prepare its user base. "We didn't want to push too fast because there was user training involved too," he notes. "But we saw progress pretty quickly. We started on a Monday, and we had cloud users by that Friday. The rest took about two months, but it all went very smoothly. To be honest, we had fewer issues migrating to the cloud than some of the times that we've had to migrate mailboxes to different servers internally."

Coastal Beverage's IT team further eased the migration process by coming up with a user priority list. They began with some of the key sales managers and then moved on to the heaviest mobile users. "We wanted to make sure that the connectivity and the setup of the iPads and other mobile devices were working correctly early on in the process," Beacham says.

With the migration complete by the end of 2014, Pope says the process went so smoothly that some users probably didn't even notice the change.

Productivity Enhancements

Mobile users have noticed, however, and it's been all for the better. Tim Skinner, a chain account manager for Coastal Beverage, says he has been able to get more done — and with better results — in less time. "What used to take me 70 hours a week, I'm now doing in 60 hours or less," he says, noting that he previously had access only to PowerPoint and Excel viewers rather than full versions.

Skinner adds, "I can do everything I need right where I'm at. I don't have to go back to the office or my home office and sit down at a connected computer to get information I need or call up someone else and ask them to pull something for me and edit it," Skinner explains. "If I'm on the road, I can pull up whatever file or folder I need, when I need it; I can edit it, email it, whatever. It's completely streamlined my work process."

Workers also appreciate the calendar functions. Office 365 enables Skinner and his colleagues to simultaneously view the calendars of multiple team members and set up meetings in seconds. "Before, we had to spend a lot of time and doubled-up effort to figure out when everyone could get to a meeting. Now we've saved all of that, and it's just plain easy."

As a result of his increased productivity, Skinner spends more time meeting with his customers, surveying accounts and developing presentations — and in the process, achieving a better work/life balance, a priority at Coastal Beverage. He expects Office 365 will enable the company to continue growing its customers and revenues.

"Having information so easily accessible makes for a lot quicker turnaround for our customers," Skinner says. "They're busy people too, and being able to get the information they need right then and there is often the difference between getting a sale and not getting a sale."

Pope says that Skinner's experience is not unusual. "I think everyone is pleased with it. Everyone just works now," he says. "There's not near as much downtime. There's a lot more productivity, and there's a lot less frustration."

The solution has especially empowered mobile users. "We've now got a solution that is completely integrated and mobile, so our mobile users can instant message people in the office, they can get everything they need on the road or from home and they can use their iPad to do video conferencing," Pope says. "It's really great."

What's more, the IT department can utilize all of its time and resources to better manage the network, optimize infrastructure performance and support devices and users. "We're pretty sold on the cloud at this point," says Pope.

Beacham says that having an experienced partner like CDW on board made the transition to the cloud easier than they ever imagined. "From the beginning to the end, it was done the way it should be done. Whether it was the setup, the troubleshooting, the migration — they pretty much were on point during every step that needed to be done, and that pretty much got us where we are as fast as we could. And now our users can just access what they need and use it to do their jobs."

Charles Harris

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