Quest® Archive Manager Improves E-mail Management for Sherwin Chan & Walshe

Sherwin Chan & Walshe is a leading financial services organization, providing accounting services to a diverse base of clients, ranging from small businesses to government departments. The firm has an array of specialties, from auditing services and tax consulting to providing business coaching, mentoring and IT services.

E-mail is now an increasingly important part of how the company's approximately 60 employees service their customer base. In 2003, Sherwin Chan & Walshe was looking for an online document management system in order to cut down the amount of paper used within the organization.

The Challenge

When looking for an e-mail management solution, Sherwin Chan & Walshe identified several key drivers including: managing the ever-increasing volumes of e-mail, delivering enhanced e-mail management with advanced search and retrieval capabilities, and the ability to access all client-related messages, regardless of who sent or received the message.

When looking at the market, Sherwin Chan & Walshe found there were many document management systems available. "The biggest variation was how the document management systems handled e-mail. We wanted the system to capture all messages," said David Bradford, IT manager and consultant, Sherwin Chan & Walshe. Many document management systems require that e-mails are profiled and this doesn't always ensure that all messages are captured. Users may subjectively decide not to add a message to the document management system, believing the e-mail is not important, whereas the organization may believe that the message does have value – now or in the future.

As an organization and thought leader, Sherwin Chan & Walshe relies on technology and has a sophisticated IT capability to support its users. The company runs Microsoft Exchange 2000, which "is used extensively, with users sending and receiving from five to over 100 messages each, per day. The business is heavily reliant on its performance," said Bradford.

Given such volumes, and the nature of its business, Sherwin Chan & Walshe sought a solution that was able to manage the organization's e-mail and reduce the likelihood of a key piece of information being lost. "We wanted to ensure a record of all correspondence," said Bradford, "and be able to audit what has left the premises and to whom the message has been sent."

The Quest Solution

"If we are going to talk about best practice, then we need to have a best practice solution in place ourselves," commented Bradford.

Sherwin Chan & Walshe selected Quest® Archive Manager as their best practice solution. Archive Manager ensures that all messages are captured and provides secure, easy access to the information contained within this critical corporate store.

E-mail volumes are now easily managed. Once an e-mail message is found, it cannot be modified, ensuring the overall system complies with any records management policies.

Archive Manager is providing benefits across the whole organization, improving e-mail storage management and server performance, and providing greater accessibility to messages and corporate knowledge.

Overview

"We wanted to ensure a record of all correspondence and be able to audit what has left the premises and to whom the message has been sent."

- David Bradford,
IT Manager and Consultant,
Sherwin Chan & Walshe

Headquarters

Wellington, New Zealand

Critical Needs

A solution that captures all e-mail messages, delivers them without losing pertinent information and provides secure, easy access.

Solution

Quest® Archive Manager

Results

- Users spent less time managing their e-mail
- All e-mail messages were captured, stored and easily accessible
- The size of the Microsoft Exchange database decreased by more than 66 percent

QUEST SOFTWARE®

The Bottom Line

"We wanted to be client-driven, to be able to grab a customer's e-mail address and search across all of our users," said Bradford.

Now with Archive Manager, all e-mail messages sent and received are captured, stored and easily accessible. Users spend fewer hours managing e-mail each week, which results in a time savings of up to 30 minutes a day, per person.

Instant discovery of all e-mail was acquired at crucial moments and necessary information is easily accessible and available as a result. In the end, Sherwin Chan & Walshe's Microsoft Exchange database was reduced by more than 66 percent and only minimal training was required.

About Sherwin Chan & Walshe

Sherwin Chan & Walshe is a significant chartered accounting and business consulting firm based in the Wellington region. They provide a range of business and advisory services to their clients and do so in a manner different from other accountants.

Sherwin Chan & Walshe was originally founded by Jim Sherwin in 1983 with Mike Chan joining in partnership to form Sherwin & Chan in 1984. In 1988 Brian Walshe joined the practice to form Sherwin Chan & Walshe, the name by which the firm is known today. They have grown steadily since 1988, increasing in size from four people to a team of more than 50 today.

About Quest

Quest Software, Inc. delivers innovative products that help organizations get more performance and productivity from their applications, databases and infrastructure. Through a deep expertise in IT operations and a continued focus on what works best, Quest helps more than 18,000 customers worldwide meet higher expectations for enterprise IT. Quest Software can be found in offices around the globe and at **www.quest.com.**