Collaborative Technology a High-Performing Investment for Orbis

Global investment firm implements “near carrier-grade” infrastructure to deliver worldwide collaboration experience.

**EXECUTIVE SUMMARY**

**Industry:** Financial Services  
**Location:** A global investment firm with offices spanning eight countries. Canadian operations are based in Vancouver, B.C.  
**Number of Employees:** 400+

**CHALLENGE**

- Employees spread across multiple offices in eight countries
- Off-hour communication demands, both staff- and client-facing  
- Heightened expectation for highly available, secure transmissions

**SOLUTION**

- Seven Cisco SX20 TelePresence endpoints and 20 Cisco TelePresence rooms globally, approximately 1 for every 16 employees  
- End-to-end, near carrier-grade routing and switching  
- Cohesive voice, video, and instant messaging

**RESULTS**

- Videoconference experience is the same at home, at the office, on the road  
- Secure VPN access at the click of a mouse  
- Improved collaboration leads to increased productivity, faster response

Orbis is passionate about performance. Established in 1989, the global investment firm currently manages more than US$25 billion in assets for some of the world’s largest companies, pension funds, and government agencies. Creating value for clients is the top priority, and to do that means excelling in all aspects of the business. The company’s global communications strategy helps make this happen.

With nearly 400 employees, spread across multiple offices in eight countries, Orbis needs a highly available, flexible infrastructure to support voice, video, and data collaboration between staff and with clients. Whether face-to-face, by phone or instant messaging, people must connect simply and reliably at all times of day and from all types of locations.

“Everything we do whether direct or indirect is to better the service we provide to our clients. I know it sounds cliché, but it is an overwhelming mantra within Orbis,” says Global Infrastructure Manager Cory Kostyniuk. “We’re not a company that implements a particular IT solution and then sits on it. We are always looking at the latest technologies to see if they can add value to our organization.”

Prior to 2008, the company had a variety of video endpoints but lacked a formal global connectivity strategy. Staff mainly relied on email and Citrix remote access to communicate. Many employees believed that working remotely was a complex, convoluted process prone to service degradation and unexpected interruptions in workflow.

“We wanted to extend people’s ability to be reachable,” says Kostyniuk, noting that a typical Orbis work day extends well beyond 9 a.m. to 5 p.m., Monday through Friday. “We’ve got people who work rotating hours around the world, and we were looking to simplify the process for everyone.”

The turning point came when a senior Orbis executive witnessed a Cisco TelePresence® demonstration. “He said, ‘We have to have this. What do we need to do?’” says Kostyniuk. “We didn’t have the connectivity we needed, so we basically started from the ground up to build a global MultiProtocol Label Switching (MPLS) environment.”
SOLUTION

Working hand-in-hand with Cisco and third-party suppliers, Orbis built a “near carrier-grade” MPLS network supported by high-performance Cisco® routers and switches. The resulting infrastructure connects offices in Canada, the United States, Japan, China, Bermuda, Australia, the United Kingdom, and Luxembourg, and relies on Cisco Unified Computing System™ (UCS®) blade servers to provide high availability for instant-on voice, video, and data services. Once in place, it facilitated the deployment of seven SX20 Cisco TelePresence endpoints and 20 Cisco TelePresence rooms, approximately 1 for every 16 employees, depending on location.

“Our investment in Cisco TelePresence is along the lines of what you would typically see in a company five times or more our size,” says Kostyniuk. The rooms are used for a variety of purposes, including staff reviews, investment strategy meetings, and client engagements. More importantly, the investment in a robust, highly available network enabled Orbis to embark on a low-risk, high-return mobile collaboration strategy.

In addition to Cisco TelePresence, the company implemented the latest version of Cisco Unified Communications Manager to help ensure the right communication experience is routed to the right device, along with Cisco Adaptive Security Appliances (ASA) to encrypt network traffic and protect against unauthorized access. It also deployed Cisco Jabber™, ensuring a consistent user experience for voice, video, and instant messaging across desktops, laptops, tablets, smartphones, and other company-issued devices.

“We have about 25 percent of our staff working remotely often after hours on a day-to-day basis. That alone is a key technology driver as we aim to make their lives easier,” says Kostyniuk. “We want to enhance collaborative communication wherever possible, whether it’s cross-site meetings, phone conversations, or desktop video.”

RESULTS

Just as Orbis investors benefit from the company’s long-term, focused, high-performing investment strategy, Cisco technology has made it possible for Orbis employees to benefit from a long-term, collaborative, highly-available technology solution.

Unified and Enhanced User Experience

Thanks to Orbis’ global strategy, communication is effortless, regardless of where employees are located. “We’re working to mirror the remote experience as closely as we can to the office experience,” says Kostyniuk. “We have changed the negative perception that working remotely was a performance-inhibiting issue.”
A typical day for an Orbis employee could start by checking email messages on a smartphone. On route to the office, a virtual private network (VPN) connection can be established over the cellular network to permit participation in either a voice or video call. Once in the office, video calls can be made from a laptop or dedicated telepresence room. Whether at home, on the road, or in the office, Orbis wants the experience to be as consistent as possible.

“When we first started down this path, voice and video existed only when you were in an Orbis office using your Cisco IP phone or TelePresence,” recalls Kostyniuk. “Today your telepresence meeting can have participants who aren’t just in another telepresence room on the other side of the world; they could be at their desk or in a home office working remotely on Cisco Jabber.”

The unified communications infrastructure is supported by members of Orbis’ 24-member infrastructure team, who work closely with Cisco partner Touchbase Global Services. Located across Australia, London, Vancouver, San Francisco, and Bermuda, they provide first, second and third-line support, 24 hours a day, seven days a week, 365 days a year.

“Everything we do is about uptime and availability, so it’s something we plan into everything we build,” Kostyniuk says.

Simplified, Secure Access

Before the MPLS infrastructure and unified communications, working remotely meant logging into a web portal, and entering a user ID, password, and security token. Now users have the option to double-click on Cisco AnyConnect®, and a secure VPN connection to the Orbis network is established.

Orbis’ IT department also switched from a competing security appliance to Cisco ASA. “ASA provides much greater flexibility,” says Kostyniuk. “It enables us to provide secure VPN connections via personal computers for staff intermittently working from home, as well as for Orbis-supplied mobile devices.”

Increased Productivity, Faster Response

Since implementing its high-performance infrastructure and enhanced collaboration technologies, Orbis has seen a steady increase in remote users. The main result is people are starting to realize they can do everything out of the office that they can in the office, says Kostyniuk.

If an urgent matter comes up, a multipoint videoconference can be established in minutes, simply by sending an email. Participants can be at any office, from Australia to Canada or somewhere in between, and can be sitting at a desk, or in a telepresence room. When an early-morning or late-day meeting is necessary due to time zone differences, people with an appropriate internet connection can conveniently connect remotely using Cisco Jabber without being in the office in a dedicated video room or desktop.

“We’re removing boundaries,” Kostyniuk says. “Mobility and flexibility are really starting to take off.”
NEXT STEPS

As much as Orbis’ global collaboration vision supports employees, it also benefits investors. “Our clients love us for what we do,” says Kostyniuk. “We don’t present the technologies we’re using as a selling feature. It’s something they experience as a value-added benefit to working with us.”

To that end, Orbis considers Cisco an integral partner. To provide the best service to both clients and employees, the company keeps a watchful eye on the Cisco roadmap and tries to align its own internal strategies with where Cisco will be 12, 24, or 36 months in the future.

Next up, the company plans to review its global switching infrastructure with a view to refresh core switches in 2014. It will also look to upgrade video endpoints now nearing the five-year mark, and evaluate technologies that will support a future bring-your-own-device (BYOD) strategy.

FOR MORE INFORMATION

For more about Orbis Investment Management Ltd. visit: www.orbisfunds.com

For more about Cisco TelePresence, visit: http://www.cisco.com/web/CA/products/telepresence/index.html

PRODUCT LIST

Cisco TelePresence
• Cisco TelePresence SX20 Quick Set
• Cisco TelePresence CTS-1100, 1300, 3000 and 3010

Voice and Unified Communications
• Cisco Jabber
• Cisco Unified Communications Manager

Servers
• Cisco Unified Computing System

Security
• Cisco AnyConnect Secure Mobility Client

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