

# Global Workforce Collaborates from One Interface

Eagle Investment Systems implemented Jabber, WebEx, and TelePresence, enabling collaboration anywhere, on any device.

## Challenge

A subsidiary of BNY Mellon, Eagle Investment Systems provides portfolio management solutions for the financial services industry, delivered from a secure private cloud. Eagle has a workforce of 600 employees in offices in the United States, India, Singapore, United Kingdom, Canada, United Arab Emirates, and China.

The company attributes its success to close collaboration with customers, who have suggested many of Eagle's innovative services. "On surveys, our customers rank us high, not only on our technology and innovation, but also our communications style," says Mike Fitzgerald, managing director and head of information systems for Eagle Investment Systems.

EXECUTIVE SUMMARY	
<b>Customer Name:</b>	Eagle Investment Systems
<b>Industry:</b>	Financial Services Software
<b>Location:</b>	Wellesley, Massachusetts
<b>Size:</b>	600 Employees Worldwide
<b>CHALLENGE</b>	
<ul style="list-style-type: none"> <li>• Collaborate efficiently and effectively in fast-growing, global enterprise</li> <li>• Enable employees in post-PC era to work anywhere, on any device</li> <li>• Lower IT support requirements</li> </ul>	
<b>SOLUTION</b>	
<ul style="list-style-type: none"> <li>• Transitioned from Microsoft Office Communicator (MOC) to Cisco Jabber, preserving MOC experience and features while extending them to mobile devices and integrating with Cisco WebEx</li> <li>• Implemented Cisco TelePresence and Cisco Jabber Video for TelePresence client to deliver in-person, high-definition video collaboration experience</li> </ul>	
<b>RESULTS</b>	
<ul style="list-style-type: none"> <li>• Unified globally distributed teams by providing collaboration tools that work on any device</li> <li>• Improved accuracy of communications by adding video</li> <li>• Simplified IT by consolidating to one interface for presence, IM, voice, and WebEx</li> </ul>	

When relocating the company's Boston-area headquarters, Eagle seized the opportunity to strengthen its communications advantage by re-thinking how the global workforce collaborated internally and with customers in a post-PC era. "Our goal was to create a collaborative work environment where it didn't matter if employees were in our Boston, Pune, India, or any other office because they always felt connected to coworkers and customers," Fitzgerald says.

One strategy was simplifying collaboration with virtual team members in other locations. Before, employees needed multiple communications tools: a phone connected to Cisco® Unified Communications Manager; Microsoft Office Communicator (MOC) for presence and instant messaging; and Cisco WebEx® for voice, video, and web sharing. Having separate tools complicated business processes. For example, using MOC, employees could click to call each other on their PCs, but to conference in a customer, they had to stop the call and start again using the voice system. "We wanted to make it easier to bring customers into the conversation, and to add video or document collaboration midway through a voice or instant messaging session," says James Baker, manager of enterprise services and support for Eagle Investment Systems.

Another idea was providing high-definition video on desktops and in conference rooms to create an in-person, face-to-face experience

for employees in different global locations, improving organizational communications and teamwork. "Emotions are the best indicators of project health, and video reveals emotions that you can't easily pick up in an email or even a voice conversation," says Fitzgerald.

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Finally, Eagle wanted to empower mobile employees by giving them access to people and information from anywhere, on any device, including personal tablets, iPhones, and BlackBerry phones. About half of Eagle's employees spend 40 percent or more of their time outside the office.

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— Mike Fitzgerald, Managing Director and Head of Information Systems, Eagle Investment Systems

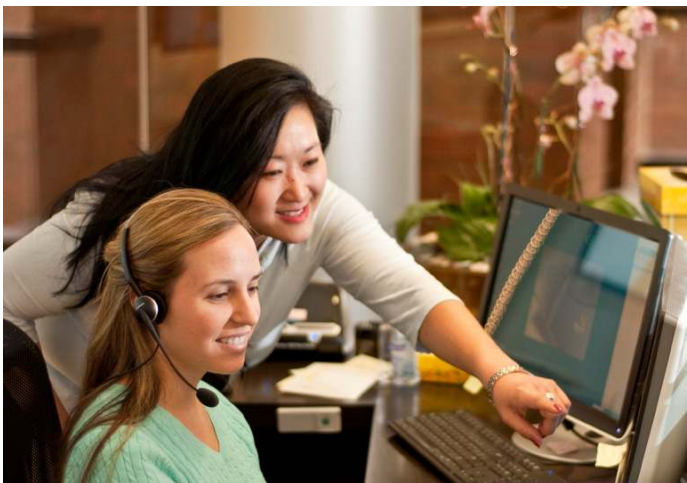
## Solution

Eagle met its goals by using Cisco Jabber™, Cisco TelePresence®, and Cisco WebEx. “Our company has a highly mobile workforce that is becoming even more mobile,” says Fitzgerald. “We are pioneering a high-performance workplace of the future that replaces desk phones with more flexible laptops, tablets, and smartphones. With the Cisco collaboration architecture and Cisco Jabber UC Client, employees can use any of these devices and any operating system for collaboration, unified communications, and video conferencing.”

The Cisco tools have become a fundamental part of Eagle business processes from software development and organizational communications to new-employee training.

### All Unified Communications and Collaboration Capabilities in One Interface

Employees can now use their PCs, laptops, and tablets for voice calls, instant messaging, desktop sharing, and video conferencing. “With Cisco Jabber, employees have the same capabilities and experience they had with MOC to start a conversation from within Microsoft applications using presence light-up, click to call, and click to IM,” says Fitzgerald. “Additionally, we can click to start a video or WebEx session from the Microsoft applications.”



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Eagle viewed the integration between Cisco Jabber and the underlying Cisco network as an important advantage compared to MOC, because the Cisco network can enforce security rules, such as who can share which types of documents during WebEx sessions. “We take a long-term view of our network and collaboration applications, so it makes sense to align ourselves with the company that provides the network,” says Fitzgerald. Eagle also appreciated that Cisco Jabber works on all devices, because the IT team only needs to support one collaboration interface for hundreds of employees and thousands of devices.

Presidio Networked Solutions, a Cisco partner and long-time trusted advisor to Eagle, provided planning, design, implementation, and support services for the high-performance workplace project. Less than two months after the project began, employees had switched from MOC on their Windows PCs and laptops to Cisco Jabber. Introducing Jabber required no additional IT headcount. “The migration from MOC to Cisco Jabber was one of the easiest migrations I’ve been involved with, both for IT and employees,” says Baker.

“Project status can’t be fully expressed by a red, green, or yellow color code. Emotions are the best indicator of project health, and Cisco TelePresence has helped with understanding emotions in meetings. Seeing from people’s facial expressions that they’re either excited or frustrated, for instance, puts you in a better position to navigate the conversation.”

— Mike Fitzgerald, Managing Director and Head of Information Systems, Eagle Investment Systems

### WebEx for Real-Time Collaboration on Documents

Most of Eagle project-team meetings require sharing a spreadsheet or other document. Now, with Cisco Jabber, one click escalates a voice or IM conversation to a Cisco WebEx session to share and collaborate on documents. Eagle’s IT staff members regularly join WebEx meetings to triage, troubleshoot, and resolve issues without leaving their desks.

### Video, for In-Person Experience in Global Enterprise

Employees can also now enjoy an in-person experience when interacting with team members around the world, thanks to Cisco TelePresence systems in each office and the Cisco Jabber Video for TelePresence clients on PCs and tablets. Employees schedule the Cisco TelePresence systems for high-level project meetings and to capture live video of companywide meetings for live streaming to global offices. The company can even switch the live feed to another office during the meeting so that executives can take video rotation when presenting their monthly board book. “Each presenter can simultaneously present a narrative and graphics and emphasize key points through body language and facial expressions,” says Fitzgerald.

## Results

### Effective Collaboration in Global Enterprise

Cisco Jabber has become the hub for team collaboration, client communications, and organizational communications at Eagle. During a recent month, the company’s 600 employees used Cisco Jabber for 90,000 instant messaging sessions, 170 Cisco WebEx meetings, nearly 13,000 voice calls, and more than 550 desktop shares.

For example, software developers in different countries, who often work on virtual teams with up to 25 people, can now easily reach colleagues and customers anywhere in the world. A developer who wants to ask a colleague about a new financial-industry reporting requirements simply clicks a colleague's name to call or send an instant message. If necessary, the developer can very quickly escalate from a voice call or instant message session to a WebEx collaboration session combining voice, video, and desktop sharing. "Before we had Cisco Jabber, we didn't do this because it would have required setting up three separate meetings," says Baker. "With WebEx, we're resolving issues much faster than when we could by sending emails, because everyone can be together at the same time."

Mobile employees are also more productive and responsive, because they can access people and information as easily as if they were in the office. "Now nobody ever needs to say to a client, 'I can give you an answer when I get back to the office,'" says Fitzgerald. "With Cisco Jabber, we can access any information our customer needs from a single interface, on any device, including a tablet or smartphone."

Cisco video applications (Cisco TelePresence, Jabber Video for TelePresence, and WebEx) further enhance collaboration across global offices by replicating the in-person experience. "Project status can't be fully expressed by a red, green, or yellow color code," Fitzgerald says. "Emotions are the best indicator of project health, and Cisco TelePresence has helped with understanding emotions in meetings. Seeing from people's facial expressions that they're either excited or frustrated, for instance, puts you in a better position to navigate the conversation."

Eagle also credits video with helping to overcome language barriers within global teams. Employees frequently turn on high-quality video during Cisco WebEx meetings with teammates in other countries to gauge from their facial expression whether they fully understand a request or may be confused. In addition, meeting participants can record and playback Cisco WebEx sessions to review everything said or shown.

PRODUCT LIST
<b>Unified Communications</b>
<ul style="list-style-type: none"><li>• <a href="#">Cisco Unified Communications Manager 8.5</a></li><li>• <a href="#">Cisco Unified Communications Manager Attendant Console</a></li></ul>
<b>Collaboration Applications</b>
<ul style="list-style-type: none"><li>• <a href="#">Cisco Jabber UC Client and Jabber Mobile</a></li><li>• <a href="#">Cisco Unified Workspace Licensing Professional</a></li><li>• <a href="#">Cisco WebEx Meeting Center</a></li><li>• <a href="#">Cisco Unity® Connection</a></li></ul>
<b>TelePresence</b>
<ul style="list-style-type: none"><li>• <a href="#">Cisco TelePresence System Integrator C-Series Codecs C90 and C60</a></li></ul>

## Next Steps

Eagle Investment Systems is planning to extend its collaboration applications to customers, strengthening relationships. One idea is extending presence and instant messaging to customers. The company is also considering moving its Cisco collaboration suite and other applications to the Cisco Unified Computing System™, which combines compute, networking, storage access, and virtualization in a single system. Server consolidation will simplify management and lower space, power, and cooling costs. "Jabber integrates our collaboration applications with the network, and the Cisco UCS will integrate our servers with the network," says

Fitzgerald. "Having full continuity from the network out to the business application dramatically reduces the complexity in service and reliability, providing an immediate return on investment. Troubleshooting an issue now takes two people instead of eight. With full visibility into all infrastructure touch points, they can pinpoint and direct resources to the root cause much faster."

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## For More Information

To find out more about Cisco Collaboration, visit: <http://www.cisco.com/go/collaboration>.

To find out more about Cisco TelePresence, visit: <http://www.cisco.com/go/telepresence>.

To join conversations and share best practices about collaboration, visit:  
<http://www.cisco.com/go/joinconversation>.




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