

## Small firm does big business with hosted email and compliance solutions

Baltimore Capital, an investment advisory firm based in Baltimore, Maryland, delivers value to customers through flexible and individualized investment strategies. The company has over 10 years in serving the investment needs of individuals, pension and profit sharing plans, trusts, estates, and charitable organizations.

With the growth of large, self-service investment firms in recent years, it is important now more than ever that Baltimore Capital deliver real value to its customers in order to remain competitive. The company's major value proposition comes in its ability to offer a flexible approach to investing that decides its style according to the mood of the market. Baltimore Capital's customers appreciate the level of personalization a smaller investment firm is able to provide.

However, in order for this value proposition to remain relevant in competition with larger investment firms, the company must have the same technological and business capabilities as the large firms. Perhaps the most important element of this is an advanced email and collaboration solution for client communication. Baltimore Capital needed a solution that included business-grade features such as:

- *Shared calendars so employees can see colleagues' and clients' availability to schedule or rearrange meetings*
- *Wireless email so top executives can stay in constant contact with the business and clients*

- *Shared task lists that allow 'to do' lists to be created and assigned, then shared with team members*
- *Shared contacts to guarantee that customers' contact information will never be lost or misplaced*
- *Added security and compliance features to meet industry standards and regulations*

After considering these needs and reviewing their options, Baltimore Capital decided a Microsoft Exchange solution was their best fit. Today, more and more financial service firms are migrating to Microsoft Exchange 2007 for their messaging and collaboration needs. As the world's most popular business messaging platform, Microsoft Exchange dominates the market with a near 60% share.

Microsoft Exchange includes all of the features that Baltimore Capital identified as crucial to doing business. In addition to calendar, contact and task sharing, it is possible to add wireless capabilities, compliance tools and many other complimentary products to the Exchange environment.

Unfortunately for most small businesses, the cost of running a Microsoft Exchange server 'in-house' is simply too much. For Baltimore Capital to deploy an in-house solution, upfront costs would exceed \$39,000.00, not including staff time necessary to maintain the environment. Baltimore Capital realized that they couldn't afford the investment or management staff necessary to build the solution in-house, so they set out to find an alternative.

In their search, Baltimore Capital



learned that outsourcing Microsoft Exchange is becoming increasingly popular as small businesses continue to realize the benefits of a hosted Exchange server. Hosted Exchange allows for all of the benefits of an in-house Exchange server – including business email, shared calendars, tasks and contacts, wireless capabilities and more – without the cost and headaches of having to build, manage and maintain an Exchange server solution.

From a cost perspective, hosted Exchange allows businesses to plan for a regular monthly fee with no surprise upgrade or maintenance costs. The fee is calculated on a per-user basis, making it easy for businesses to project future costs based on expected future hires and staff growth. As a small business, Baltimore Capital finds the month to month investment far more appealing than a large overhead investment. "By paying a low fee each month rather than a huge upfront investment, we are able to invest in other projects that help us continue to grow our business," says Greely.

From an IT perspective, Exchange as a hosted service allows companies like Baltimore Capital to maintain control over important things such as mailbox creation, wireless email activation, distribution lists and more, while taking away the hassle of purchasing and managing hardware, software and licenses. Hosted Exchange

users benefit from having the time and ability to focus fully on their core business, rather than dedicating staff time to managing an email server environment.

Once Baltimore Capital identified hosted Microsoft Exchange 2007 as its ideal solution, the company needed to choose the right provider. Sean Greely, Baltimore Capital's Chief Officer of Operations, had worked with Intermedia, the worldwide leader in business email solutions, in the past and felt it was the perfect provider for the company because of Intermedia's financial services focus. Intermedia offers a hosted Microsoft Exchange 2007 solution that is built specifically for small and medium businesses who need advanced email and collaboration solutions, but don't have the capital or staff to manage it alone.

Lowering costs by outsourcing Exchange to a hosting provider does not have to mean lowering the quality of the service. Intermedia delivers a far superior Exchange environment than one built in-house, with multiple, Tier-1 backbone internet connections and four Tier-4 world-class datacenters. Intermedia uses only the highest grade equipment from the most trusted leaders in the industry, like EMC, Dell and Cisco, to ensure the highest level of service.

Intermedia has the world's largest team of Microsoft Gold Certified Exchange experts in the industry in order to take care of your Exchange server and support needs, 24 hours a day, 7 days a week. Intermedia also offers a 99.9% uptime guarantee to assure that your email will always be available. With over 275,000 hosted mailboxes, Intermedia is the most trusted Exchange host in the world.

"Outsourcing our Exchange server to Intermedia just made sense for us. We needed something reliable, affordable, convenient and most importantly secure," says Greely. "My past experience with Intermedia at my previous company made me

feel confident that Baltimore Capital could trust and greatly benefit from Intermedia's services," says Greely.

In just a matter of days, Baltimore Capital's entire staff was up and running on Intermedia's hosted Exchange environment. Greely used Intermedia's proprietary Web-based control panel, HostPilot®, to create mailboxes for all staff members and download a free version of Microsoft Outlook 2007 on each desktop for all of his users to have access to the full capabilities of Exchange 2007.

In addition to its hosted Exchange 2007 service, Intermedia also offers a suite of add-on services including wireless email access through BlackBerry, Windows Mobile ActiveSync and Good Mobile Messaging; advanced antispam and antivirus services; and most importantly for Baltimore Capital, email compliance solutions.

All businesses within the financial services industry are obligated to comply with numerous industry regulations and standards in connection with the preservation, monitoring and eDiscovery of electronic business communications. Baltimore Capital is no different and so in order to meet these regulations, the company again turned to Intermedia for a hosted solution.

The compliant archiving solution that Intermedia delivered, in partnership with Global Relay, captures and archives an authentic and complete record of all electronic business communications (email and attachments, IM, e-fax, Bloomberg, Reuters, BlackBerry and any imported legacy email and PST files) in a secure but easily accessible offsite storage system for regulatory compliance, audits and legal eDiscovery purposes. The service ties in seamlessly with Intermedia's hosted Exchange solution, requiring no additional work or technical requirements from Baltimore Capital.

Intermedia's offering of Global Relay's Message Archiver is specifically

engineered to meet the stringent electronic communications compliance requirements of the SEC, FINRA, Sarbanes-Oxley, and the Federal Rules of Civil Procedure (FRCP). Again using HostPilot, which allows Intermedia's customers to quickly and easily manage their own settings in real-time, it only took Greely two clicks to activate the compliant archiving solution with Intermedia and arrange a contract with Global Relay to have a fully compliant email solution.

"The archiving solution from Intermedia has worked very well for us. Searching archived messages is simple and fast and the service itself requires no attention at all," says Greely.

Through hosted Microsoft Exchange 2007 and hosted compliant archiving from Intermedia, Baltimore Capital has access to the same email, collaboration and compliance technology that it's large, Fortune 500 competitors have. This allows the company to remain competitive and deliver its value proposition of flexible, individualized investing to companies, organizations and individuals who recognize the benefit of a small, personalized investment firm.

Baltimore Capital was able to fulfill their email and collaboration needs with the advanced features of hosted Exchange while the strenuous industry e-communications standards and regulations that they must meet are covered with Intermedia's compliant archiving solution. For a simple and regular monthly fee, Baltimore Capital can focus on its business and let the experts at Intermedia manage the technology needed to do that business.

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