



jh
Banking

CASE STUDY

Microsoft® Office 365™

“Microsoft Office 365 has generated measurable cost savings in the form of avoided capital expenditures and recurring costs – totaling nearly \$350,000 over five years.”

Phillip Wheat
Senior Vice President/Chief Information Officer
First US Bank

Institution:
First US Bank

Location:
Thomasville, AL

Website:
www.firstusbank.com

Assets:
\$567 million

Founded:
1952

Microsoft Office 365

Cloud-Based Delivery of Industry-Leading Microsoft Business Solutions



“Microsoft Office 365 provides out-of-the-box mobile access to email and shared calendars, along with remote Web access ... a key requirement which had been unmet until now.”

Phillip Wheat

First US Bank has served central and southern Alabama communities since 1952. Strong, long-term relationships with consumer and business customers and an excellent reputation for delivering high levels of customer service are just a couple of the reasons the bank has been able to grow and prosper. First US Bank now has 19 banking locations and 24 acceptance loan company offices.

Because managing the communication efforts across 43 different offices can be a difficult task, First US Bank recently started looking for a cost-effective, timely alternative to its existing email system. As an existing Jack Henry Banking® client, the bank sought out its Microsoft Office 365 solution.

Senior Vice President and Chief Information Officer, Phillip Wheat, explains below how Microsoft Office 365 has exceeded his expectations by generating measurable cost savings, improving efficiency, and providing out-of-the-box mobile access to email and shared calendars.

Jack Henry Banking: What was the initial business reason you acquired Microsoft Office 365?

Phillip: Our existing email system was outdated with failing hardware and no vendor support. We needed to implement a low-cost exchange environment quickly. Microsoft Office 365 was the most affordable and immediate solution available. It was also easy to set up – the entire conversion process was completed within three weeks, and the Jack Henry Banking support team made it a pretty painless process. Plus, the familiar, intuitive interface makes it easy to use.

JHB: Can you tell us how Microsoft Office 365 has benefitted your bank?

Phillip: Microsoft Office 365 replaced our previous system that was provided by an out-of-business vendor. We like that this solution is offered by Jack Henry Banking – a strong and trusted vendor with a great support team and personable customer service representatives.

This solution provides out-of-the-box mobile access to email and shared calendars, along with remote Web access. The OneDrive component allows the creation of portable, shareable, and secure online folders, a feature that empowers remote users. Our commercial lenders consider this a key requirement which had been unmet until now. The pay-per-user, pay-per-month pricing structure allows both growth and reduction of users on an as-needed basis.

And in addition to everything else, Microsoft Office 365 has generated measurable cost savings in the form of avoided capital expenditures and recurring costs – totaling nearly \$350,000 over five years.

JHB: Looking at your competitive landscape, what are the competitive advantages that

Microsoft Office 365 generated for your bank?

Phillip: Having a cloud-based service allows our bank to be location-agnostic and independent. Employees can access our system anytime and anywhere, while operating capital is invested elsewhere. This allows our lenders to respond quickly to customer requests and questions.

JHB: Have you received any positive feedback from bank employees since implementing Microsoft Office 365?

Phillip: We've had very positive feedback. Our employees have said that Microsoft Office 365 is incredibly easy to use and they've commented on its mobile adaptability. They also love the shared calendars feature.

JHB: If you would recommend this solution to other banks, what is the most compelling statement you would make to another institution considering Microsoft Office 365?

Phillip: Microsoft Office 365 is a low-cost, low-risk, high-value solution.



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Microsoft Office 365, available through a strategic partnership with Microsoft, is a cloud-based subscription service that makes the industry-leading Microsoft Office Suite, Microsoft Exchange, Microsoft SharePoint, Microsoft Office Web Apps, and Microsoft Lync available as an Internet-based service. Cloud-based delivery reduces the demands on financial institutions' IT departments for in-house hardware configurations; software installations; and ongoing support, maintenance, administration; and capacity planning. An intuitive control panel enables even non-technical associates to configure and customize Office 365. The pay-as-you-go model enables financial organizations of all asset sizes to provide their employees with world-class business tools, including reliable and familiar email services, for an established, per-seat monthly fee. Office 365 also benefits from Microsoft's uptime service-level agreement which is backed by financial guarantees. Jack Henry & Associates serves as Microsoft's Office 365 syndication partner in the financial services sector.