

# PLANET TECHNOLOGIES BRINGS REGIONAL BANK UP TO SPEED WITH OFFICE 365 DEPLOYMENT



**Helping customers realize their financial dreams:** This simple statement serves as the powerful catalyst behind everything Orrstown Bank has strived for since opening its doors in 1919. Individuals and businesses in central

Pennsylvania and northern Maryland rely on the financial services provided by Orrstown Bank's 21 locations for all their banking needs.

To reduce on-going IT management costs and to further empower its 350+ employees to provide a high level of customer service, Orrstown Bank decided to provision a large portion of its IT services to end users through cloud-based platforms. As part of this overall strategic shift, Orrstown Bank decided to move its email platform to the cloud.

## Planet Technologies: An Experienced Industry Partner with Microsoft Expertise

Orrstown Bank previously relied on an on-premise, legacy email solution (IBM Lotus Notes Domino) running on a fully-depreciated IBM AS400 that also ran the bank's core software. As the bank moved the core operations to the cloud, Benjamin Wallace, the Executive Vice President of Operations & Technology for Orrstown Bank, determined the time had arrived to also deploy a new email platform.

"Rather than refresh our email platform with an on-premise solution, we decided to move to a hosted cloud solution," Wallace says. "We could not cost-effectively commoditize such a solution, so we decided to deploy the hosted Microsoft Office 365 solution. The platform allows us to scale easily while also giving us flexibility in how we set up our email environment."

From the cloud, Office 365 provides the same capabilities as the on-premise version of Microsoft Office—Word, Excel, PowerPoint and OneNote—along with Microsoft Outlook business-class email and calendaring.

To accomplish the deployment, Wallace turned to Orrstown Bank's long-time Microsoft solution partner, Planet Technologies. "For financial businesses deploying a Microsoft solution, partnering with Planet Technologies was the obvious choice," Wallace says. "They particularly understand the nuances of solutions like Office 365 as well as the intricacies of the regulatory and compliance side of the banking industry."

## Technology Advice for Financial Industry Due Diligence

Wallace also realized that augmenting his internal team's expertise and bandwidth with the expertise and services provided by Planet Technologies would accelerate how quickly the bank could migrate to the new email platform. In addition to helping Orrstown Bank design the final architecture, Planet Technologies provided counsel as the bank performed an extensive due diligence process.

"We briefly considered handling the project on our own, but we knew there would be aspects that Planet Technologies understands from its past deployment experiences," Wallace says. "And based on our existing relationship, we trusted the advice and capabilities that Planet Technologies brings to the table."



## SUMMARY

Planet Technologies was entrusted with the migration Microsoft Office 365 from an on-premise email solution to the cloud by Orrstown Bank as well as assisting with due diligence, solution design and deployment to ensure a smooth transition.

## Project Technology

Microsoft Office 365  
Microsoft Azure  
Microsoft Lync  
ZixCorp  
EZ Cloud

## Project Results

Lowers on-going email platform TCO  
Eliminates system maintenance  
Facilitates system administration  
Enhances end-user email and collaboration capabilities

## Project by the Numbers

360 employees  
21 branch offices  
\$1.2 Billion in total assets

When financial institutions deploy new technology, they must first ensure solutions comply with the strict security and privacy regulations imposed on the banking industry. Orrstown Bank has extensive experience performing due diligence, but Wallace found it helpful to collaborate with Planet Technologies because of their volume of experience and knowledge of regulatory issues within the financial industry.

“For a bank to embrace the cloud, due diligence must be performed to confirm security and conformance with regulations,” Wallace explains. “We conducted a risk assessment and created controls for anything that did not meet the security requirements. Planet Technologies proved themselves to be invaluable in helping us navigate the process, educate us on the Microsoft components and in helping us create policies for our corporate-owned mobile devices.”

### Collaborative Effort Enables Easy Cutover

As Planet Technologies collaborated with Orrstown Bank on the design and deployment plan for Microsoft Office 365, Wallace also turned to the bank’s trusted IT partner for additional assistance—the installation of new desktops with Windows 7 refreshes at all 21 branches. “It was important to deploy the new desktops in advance of the email migration, and Planet Technologies came through for us once again by providing resources to help deploy the new desktops on time,” Wallace says.

After completing the desktop installation, Planet Technologies ensured the Microsoft Office 365 cutover went smoothly. Orrstown Bank conducted end-user training, and Planet Technologies assisted with a staged deployment that migrated users so they could test the new email platform before Planet Technologies migrated their email files.

“This approach allowed everyone to feel comfortable with the new environment and simplified the final cutover,” Wallace says. “On the weekend of the final conversion, we just had to flip a switch.”

Planet Technologies also converted mail box content and public folders from Lotus Notes Domino to Microsoft Office 365 and set up two Active Directory file servers on the Microsoft Azure platform to host the domain controller for Office 365. Active Directory provides single sign-on for all Office 365 applications while the domain controller routes file traffic.

“Orrstown Bank and Benjamin Wallace, in particular, appreciated the depth of knowledge and experience that Planet brings to this project. We know Office 365, and we also understand the security, compliance and regulatory issues surrounding a cloud deployment in the banking industry.”

– **Scott Tucker**, Founder and CEO,  
Planet Technologies

“You need a partner like Planet Technologies to properly architect the solution for your cloud deployment so it works the way you need it to as soon as you cutover. It doesn’t make sense to try it alone.”

– **Benjamin Wallace**, Executive Vice President of Operations & Technology, Orrstown Bank

### The Benefits of Microsoft Office 365

With the cloud-based Microsoft Office 365 platform now fully deployed, Orrstown Bank can leverage the solution to generate multiple business and IT benefits as well as benefits for end users:

- + Lower Run-Rate TCO
- + Secured Data
- + Improved Reliability
- + Hassle Free
- + Scalability
- + Advanced Email
- + New Collaboration Capabilities
- + Easy System Administration

### ABOUT PLANET TECHNOLOGIES

Planet Technologies is the leading provider of Microsoft consulting services to public sector and commercial organizations. Our team of Microsoft experts provides support for Office 365, CRM, SharePoint, System Center, SQL, and Windows 7 and 8. Planet has significant experience in deploying business intelligence, cloud services, unified communications, records management, workflow automation, collaboration, systems management, virtualization and more.

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