



## Top Norwegian Wealth Management Firm Profits From Custom OWA Productivity Solutions Built By MessageWare Developers



**Formuesforvaltning**  
<http://www.formue.no/>

**Industry:**  
Wealth Management

**Challenge:**  
Create full-featured, integrated OWA and CRM cloud-computing email environment

**Products:**  
MessageWare OWA Suite and custom OWA software development

**Key Benefits:**

- Combined OWA/ CRM solution
- Enhanced OWA
- Integration with document management platform

### ■ SITUATION

For a country no bigger than Montana, Norway exerts an influence on global business and public affairs that far outpaces its size. The Scandinavian nation of 4.7 million people is officially the most peaceful country in the world as ranked by the Global Peace Index; it also is the second wealthiest by GDP per person (Luxemburg is first) and scores second highest in the Environmental Performance Index.

Due to its prominence in the worldwide high-tech industry, Norway produced an entire generation of dot-com millionaires in the last decade. Formuesforvaltning AS, Norway's largest privately-owned independent wealth management firm, was formed in 2000 to service these and other affluent customers. Now handing over \$3.6 billion USD for its clients, the company has 200 employees working from its Oslo headquarters and 15 regional offices.

From its start, Formuesforvaltning—whose name, which means “fortune advising” in Norwegian, is often shortened to Formue—supported mobility for its employees. “Our money managers travel a lot, both for business and pleasure. And not always by traditional means,” noted Stephen Karl Ranson, Formue's IT director. “Many actually ride their bicycles or even ski to work. Laptops don't fit the ‘lightweight’ lifestyle our best producers prefer to lead.”

Because of his company's desire for true cloud-computing mobility, Ranson and his team implement Web-based applications, including Software as a Service (SaaS) alternatives, whenever possible. Outlook Web Access (OWA), Microsoft's Web-based email client, was a natural choice for Formue. But it wasn't a complete solution.

“Outlook Web Access is very good, but we needed additional features. At the top of the list was calendar sharing capabilities,” Ranson noted. “Our in-house development team was completely capable of handling the task—after all, we custom-built our own CRM platform—but we decided there was no need to reinvent the wheel if a good outside development partner with OWA expertise was available. So we began our search.”

### ■ SOLUTION

Ranson and his IT team soon learned about MessageWare, the leading Outlook Web Access custom development/integration vendor. MessageWare, a Microsoft Gold Partner, offered Formue a rich suite of OWA productivity solutions.

“Finding MessageWare was like a gift,” Ranson said. “Once we saw all the tools and development expertise available through MessageWare, it gave us the impetus to undertake a serious upgrade of OWA.”



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*– Stephen Karl  
Ranson, IT Director*

Formue’s initial interest was in CalendarShare 2007, MessageWare’s application that allows users to view multiple employee calendars side-by-side, for easier meeting scheduling. With CalendarShare, users can set permissions that allow certain co-workers to view, edit or manage personal appointments; they can also book resources such as conference rooms and A/V equipment through the same interface.

After assessing the added value of MessageWare’s other products, Formue went on to implement the whole MessageWare OWA Suite of seven products. However, it wasn’t long before Formue realized they needed a way to extend their adoption of Business Process Management (BPM) to OWA. This focus entails honing and directing business process so the company can be as responsive and efficient as possible. To accomplish this, Formue designed a set of internal web services that allows for interaction with the various CRM components, including OWA.

Formue turned to MessageWare again, this time to complete their adoption of BPM and implement the “glue” between OWA and their CRM solution. This step resulted in a tight integration between OWA message composition and the CRM system. It enables users to quickly and efficiently address OWA-generated email correspondence to selected clients within the CRM framework. In addition, users are now able to classify the message with a dynamic list of classifications prior to sending.

“The MessageWare custom development team wanted to exceed our requirements. They said their method was all about quality, and they felt they could give us more,” he recalled. “We were able to work directly and very meaningfully with the team. The process went very smoothly, and the quality of the deliverable was very impressive.”

### ■ RESULTS

“Our calendar sharing capability is already out, and the initial feedback from our employees is extremely positive,” Ranson stated. “It looks great and is seems very natural in OWA. In fact, it doesn’t feel like a third-party component at all.”

Formue set a two-phase implementation for its MessageWare-supplied solutions. The first was a rollout of the MessageWare OWA Suite and the combined CRM/OWA integration with basic sharing and collaborative meeting/task capabilities; the second is the integration with the firm’s document management platform, which will enable workers to set meetings based on information found in reports and other papers in the combined OWA/CRM solution.

“People are already asking for the second phase, which tells me they’re finding the combined solutions to be very valuable. We also plan to implement a full range of features through Microsoft Exchange which will allow people to query meeting information for inclusion in reports,” Ranson said.

For Formue’s IT staff, the interaction with MessageWare’s development team has been as positive as the OWA enhancements themselves. “We’ve received lots of good ideas, from attachment viewing to improved security,” noted Ranson. “MessageWare has become a real business productivity partner for us.”



## ■ ABOUT MESSAGEWARE

Founded in 1993, MessageWare develops and markets solutions that enhance and secure Outlook Web Access. A trusted Microsoft Gold Certified Partner and a Global Exchange ISV for 15 years, our applications give companies of all sizes the ability to enhance, secure, and customize OWA.

MessageWare solutions give organizations a greater return on their Microsoft Exchange investment through increased employee productivity and reduced support and IT administration costs. MessageWare products are used by over 2,500 enterprises and four million users worldwide, from Fortune 500 companies to small businesses, in every industry including banking, education, financial services, government, healthcare and legal services.

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