



Case Study

# Mid-Size Financial Institution Upgrades Their Cloud Architecture with a More Efficient and Cost-Effective Solution

## The client

Built on five generations dedicated to customer support, corporate citizenship, and community service, the client is a U.S.-based organization dedicated to supporting the financial and civic needs of their outlying consumer base. Their solid capital position boasts the financial strength to offer larger lending limits, new loans, and convenient technological advancements to customers. Currently, the client serves the community via more than 100 branches across two states.

Since its founding owners' move into the financial sector in 1952 and the organization's full expansion in 1999, the company has been managed and chaired by members of the same family and continues to build on a community-based approach to their clients' financial needs.

## The challenge: Evolve the company's outdated cloud backup system with a solution including data management and long-term archive capabilities

The client had been relying on a cloud backup system that had become outdated in terms of functionality and usability. Its architecture was overly complex and relied on media agents running in the cloud, making it difficult to manage and challenging for administrators to learn. It also took an excessively long time to back up data — 500GB would take more than six hours.

With their licensing renewal fast approaching and the addition of new staff eager to approach data backup with a fresh perspective, the client was ready to find a solution that could more effectively replace the one they currently relied on. However, cost was a significant factor, as was simplicity of use. It was also important to the client that the replacement solution was more forward-thinking, with the ability to put workloads in the cloud. As such, the client sought protection for Office 365® data and wanted to leverage more of an OpEx model to meet their advancing needs.

Uncertain that they could find a solution that would meet all of these specific requirements, the client reached out to Insight, whom they'd worked with before via a separate storage-related transaction we had assisted with.

## Industry:

Financial Services

## Insight provided:

- Project initiation and discovery
- Two effective cloud storage solutions
- Virtual lab for system testing and comparisons

## Insight services:

- Consulting Services
- Professional Services
- Migration Services
- OneCall Support Services

## The solution: Offer two advanced cloud storage options for comparison and assist in data migration

Insight had previously worked with the client through the account team via a Dell EMC™ storage purchase after winning a bidding war over a legacy client. Through the success of that partnership and the timing of their licensing renewal with their current cloud storage solution, the Insight team had become a trusted advisor to the client, who valued our honesty. This allowed us to introduce the client to vendors offering more current and advanced cloud storage options that would better suit their needs.

We connected with the VP of Data Structure and Operations, his associated teams, and company security experts to present them with two cloud storage solutions: Cohesity and Rubrik. To help the client decide, we went on-site and performed a virtual Proof of Concept (POC), while also leveraging virtual labs to demo the two new products alongside their legacy solution. Our Research & Innovation Hubs are a unique concept that allow clients the opportunity to validate new technologies and test-drive cutting-edge solution designs in a simulated, risk-free environment. This also allows us to accelerate implementation and onboarding with pre-deployment staging and imaging.

As the client sampled both options, we stayed on hand to answer questions, offering insight into each product's technical parameters and how each could effectively address their needs. By offering the client two options to compare against their current cloud storage solution, they were able to test both options and use our expertise and insight to identify the product they felt most comfortable implementing companywide. The Insight team was able to support the client in choosing Rubrik Go™, with the entire process from introduction to implementation taking just nine months. We have also been providing Insight OneCall™ Support Services around this solution as the client gets up to speed on its use. With an eye for minimizing downtime and increasing productivity, our industry experts specialize in hardware support and software technical issues to become a one-stop shop for IT technical needs.

## The benefits: Updated and advanced cloud architecture with faster backups

While the client is still in the process of migrating their data, the implementation is now 90% complete and the company is already seeing the benefits of working with Rubrik. Rubrik has a direct tenant in the cloud to archive Office 365 and protect its data, storing it in Microsoft® Azure® via another storage account for easy data transfer. The company is now protecting more than 2,500 mailboxes using this feature.

Additionally, Rubrik's Software as a Service (SaaS) cloud strategy provided the pathway to migrate off of tape and move archive (first), with the ability to eventually migrate more workloads to the cloud. Rubrik has also reduced the client's backup and restore times, helping them save more than 20 hours per week. The client's audit times have also been reduced from weeks to hours.

As the client's needs evolve and change, Rubrik now gives them the simplicity and flexibility they need to manage their cloud backups. The client has since committed to a subscription model that allows them to refresh their hardware after three years, with a Total Cost of Ownership (TCO) of 30% savings. Thanks to this team effort, the Insight team was able to satisfy the cloud objectives of their Board and CIO.

### Benefits:

- No off-siting required for backup — data stays in Azure
- Simplicity and ease of use
- Reduced audit times from weeks to hours

**95 TB**

of data moved to new solution



Quick restores saving more than 20 hours per week

Large cost savings up to  
**\$300,000**