

A pink horizontal bar with the text "Case Study" in white, positioned below a photograph of modern glass buildings.

# Insight helps leading financial institution transform its storage and backup environments to provide better staff and customer experiences

## The client

An Insight client for more than a decade, the organization is a U.S. financial institution that offers a wide range of commercial and consumer banking products. In business for over 100 years and with more than 100 branch locations, the company is a recognized leader in its space.

**The challenge:** Modernize the company's storage and backup and disaster recovery environments to support continued growth, improve customer experiences, and drive staff efficiencies

As a progressive organization focused on leveraging IT to its competitive advantage, the bank was in the process of developing and executing a software-defined data center. As part of this modernization effort, the client engaged us to assess its current storage and backup and recovery infrastructures.

After assessing the aging infrastructure and future business needs, Insight and the bank's IT team collaborated to craft and implement a plan for updating its technology to achieve intended business outcomes, including:

- Drive greater efficiency
- Reduce process times
- Improve the customer experience
- Differentiate itself from the competition

## Industry:

Financial

## Insight provided:

- Storage refresh with flash-based technology from Pure Storage
- Backup and recovery refresh with Rubrik

## Insight services:

- Design
- Implementation
- Data migration
- Project management
- Support

The modernization plan entailed two key areas:

#### + Storage

We recommended upgrading the storage infrastructure to flash-based technology by Pure Storage. Flash-based technology provided simplified management, greater performance, and simplified scalability.

#### + Backup & Recovery

To achieve the same efficiencies in this area as they would be getting with their storage refresh, we recommended leveraging the enhanced backup and recovery capabilities of Rubrik.

## The solution: Simplified management, greater scalability, enhanced performance

To assist with the implementation of the new Pure Storage solution and data migration, Insight performed a pilot migration and created a detailed runbook for use going forward. We also coordinated the rental and licensing of data migration tools, and provided training and guidance on how to use them.

When the pilot project was complete, the client's IT team began migrating production data in two data centers following the proven Insight data migration methodology. This process includes discovering the environment, analyzing application and infrastructure dependencies, scheduling internal and external resources, and negotiating any required downtime — virtually zero in this instance.

The backup and disaster recovery portion of the project was performed in a similar fashion. Following an on-site Rubrik proof of concept to validate the new system, and testing of all the new technology, the bank was confident that the solutions we had designed would meet their needs. In order to ensure that the cutover took place in a careful and controlled manner, it was decided that the new environment would be spun up alongside the existing one, with Insight managing the gradual migration of datasets.

## The benefits: Greater operational flexibility, simplified management, and streamlined processes

In addition, the time required to run financial reports, close quarters, and perform other business processes has been greatly reduced. Internal customers served by IT have reported improved performance and response, which are having a positive impact on efficiency and improving the internal client experience. Processes that used to take days now take hours, and those that took hours are now completed in minutes.

The speed of the flash-based storage has also provided an enhanced external customer experience. What's more, the new Pure Storage system is highly scalable and easily can be expanded to support future company growth.

## Benefits:

- No disruption to operations or customer experience during systems implementation and data migration
- Scalability to support business needs
- Improved flash-based storage performance for better customer experience
- Reduced process runtimes from days to hours, and hours to minutes
- Enhanced backup and recovery capability
- Simplified management freeing IT resources to address higher-level objectives

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