



Client Story

How Westerra Prioritized Digital Transformation in the Face of Disruption

Disruption came to every organization in 2020, but some were able to bounce back faster than others. Learn how Westerra Credit Union was able to put IT modernization plans on hold while dealing with disruption and then pick them up again just a few months later.

The vision: Pivot to remote work without disrupting long-term transformation goals

Before the pandemic began, Westerra Credit Union was working on an IT modernization strategy around Virtual Desktop Infrastructure (VDI). The strategy was years in the making but was set aside when Westerra had to make an immediate shift to remote work. The company needed to expand its remote work capabilities in the short term and get back to long-term transformation as soon as possible.

Westerra Credit Union is committed to its purpose of teaching people to prosper. With member-oriented services, a passion for supporting local and commitment to the highest standards of financial strength, Westerra is focused on building a modern financial community.

Weighing transformation plans in light of a pandemic

For Westerra Credit Union, digital transformation was a long-term goal to achieve in due time. In 2018, the organization began to reconsider where it was going as a company and how it might differentiate from other banking institutions. Technology was a driving factor for members, so Westerra started exploring how to deliver a modern technology experience.

Dan Groves, vice president of Westerra IT, said this desire for a modern IT experience influenced the decision to invest in IT modernization and improve the employee experience. Groves had experienced success with VDI in the past and knew it could be the solution Westerra needed. Already having a long-standing relationship with Insight for hardware procurement and software licensing, Westerra engaged Insight for VDI consulting and an implementation strategy.

Industry:
Banking

The challenge:
Support quick-turn workforce needs while prioritizing long-term transformation.

The solution:
A partnership-driven approach to implementing modern workplace solutions, including VDI and VMware Workspace ONE

- Insight provided:
- Device procurement services
 - VMware Horizon implementation
 - VMware Workspace ONE implementation
 - Ongoing Managed Endpoint services

- Insight services:
- Consulting Services
 - Professional Services
 - Managed Services

These modernization plans were years in the making. “The process took a few years,” said Groves. “Modernization wasn’t a high priority. We were getting by and managing without any issues, so the urgency wasn’t there.”

Eventually, the business grew enough that the time was right to get serious about VDI. After engaging in demos and a full proof of concept with VMware Horizon®, Westerra was ready to take the next step. But the company’s plans came to an immediate halt with the advent of the 2020 pandemic.

“We had to look at how we could do things differently, but still maintain proper controls, security, compliance and regulatory needs. All of that had to be balanced with our users’ ability to work. That’s been our biggest challenge.”

Dan Groves, Vice President of IT, Westerra

Expanding remote work capabilities

In March 2020, Westerra’s primary concern was getting all employees up and running from home. While our client already had some remote capabilities, the majority of the workforce was on-site. Users required access to respective branches as well as full Windows® 10 desktops for daily tasks and access to databases containing sensitive financial information.

“We did whatever we could to get people working from home, whether that was giving them PCs or laptops to take home,” said Groves. The client worked with Insight to acquire additional laptops in the short term just to keep employees working. Despite the disruption, Westerra never lost sight of VDI.

Making VDI a reality

Realizing remote work was here to stay, Groves’ team set their sights on stabilizing the remote environment and establishing device and process standards. With Insight’s help, they brought the full workforce up to the same standard by the end of August — making it time to start looking at VDI again.

Through Insight’s Professional Services for VMware Horizon implementation, Westerra achieved a full-stack Horizon Enterprise deployment with True SSO, UAG, App Volumes, DEM, Instant Clones and full Windows 10 desktops. The entire Horizon cluster was deployed in Westerra’s data center in Colorado with 300 desktop images deployed, enabling connectivity between home computers and branches.

The outcome: A modernized workplace supporting continued transformation and business success

Once they met their VDI goals in September, Groves’ team was looking to the next project. With so many remote devices to manage, Groves wanted a more efficient solution. So the next big project became implementing Mobile Device Management (MDM) with VMware Workspace ONE®.

Westerra completed implementation of the platform in Q1 of 2021, anticipating the combined functionality of Workspace ONE and Horizon to serve as a complete digital workspace, delivering:

- Simpler, centralized device management
- Increased security and compliance with financial regulations
- Greater flexibility for employees who want to work anywhere and leverage personal devices

Why partnering with Insight was a must for Westerra

Groves said he valued Westerra’s relationship with Insight because it represented true partnership. Rather than providing Westerra a turnkey solution for VDI and MDM implementation, Insight worked side-by-side with Westerra teams to share knowledge in context and ensure they were fully prepared to take over management of the new environment.



Benefits & outcomes:

Implemented VMware Horizon and Workspace ONE
for 300 users



Simplified device management

Improved
endpoint security
and controls



Delivered greater flexibility
for employees inside and
outside the office

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“The way we did the implementations is my admins drove while Insight’s engineers sat with them and walked through all of it side-by-side. So the knowledge transfer happened during the processes — it wasn’t a big knowledge dump at the end... Sometimes implementations take a little longer day-to-day, but the knowledge transfer happens during the implementation, which leads to a better implementation overall.”

Looking to the future

Of course, Groves and the Westerra team aren’t stopping here — there’s always another project on the horizon. The team wants to explore some additional work around modernizing the workplace, including multi-factor authentication, identity and access management, and employee onboarding and offboarding automation. And, at Insight, we are excited to continue partnering with them and watching them grow.

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