

CASE STUDY: FINANCIAL SERVICES

A FINANCIAL INSTITUTION NEEDED AUTOMATED PCI COMPLIANT DATA BACKUP

A financial institution came to IPR more than five years ago seeking a professional provider of automated data backup services. At the time, data backups at this firm were managed with internal IT resources and manual processes. This manual approach created undue risk for the firm, as is the case with any data backup strategy that relies on humans to remember to complete backups instead of strategies that rely on automation. Additionally, the IT leadership at this financial institution recognized their team was spending an inordinate amount of time on manual backup. The firm hoped implementing automated data backup would enable internal team members to focus on mission-critical projects related to security and the end user experience.

Their search for a PCI compliant provider of data backup services led them to IPR Secure. After a vetting process, the IT team at this financial services provider selected IPR to be their data backup services provider for three key reasons: IPR's reputation for delivering a personalized approach, the solutions and service IPR offers, and IPR's proximity as a major regional managed service provider.

"This IT team knew they needed backup, but more importantly they knew they needed a team of trusted advisors," said IPR Secure's Vice President of Client

Relationships. "If they had gone to AWS as their primary data backup provider, calling support would result in being put on hold. This team wanted to be able to pick up the phone, talk to a real person, and have meaningful, strategic conversations about their IT infrastructure. They found the personalized approach they were looking for with IPR."

To make their decision, this company underwent exhaustive due diligence of IPR. They called up references and were impressed with IPR's reputation and the positive feedback from existing clients. They evaluated the suite of solutions and services offered by IPR and determined they would be able to meet their immediate needs and to plan strategic growth in the future as those needs evolved. After rigorous research and multiple site visits, they confirmed their decision to begin an engagement with IPR.



WORKING TOGETHER TO DEVELOP A CUSTOMIZED DATA BACKUP SOLUTION

To kick off their engagement, IPR facilitated a strategic discovery session to uncover this firm's unique needs. As a financial services provider, they handle vast volumes of sensitive financial data on behalf of clients every day, and need to be sure that the data is always backed up and secure. Together this customer and IPR decided to implement DataGuardian, IPR's secure, reliable backup solution.

"We engaged stakeholders from business and technology divisions from across the organization during our discovery engagement," said IPR Secure. *"After the discovery phase completed, we established secure networking between the client site and IPR data centers, implemented security monitoring, and tested data and backup flows. The entire solution was in production within a few days."*

The solution not only allowed the financial institution to eliminate the risk that had been present in their manual backup processes but also enabled them to meet their RTO and RPO objectives. Over the next several years, the solution backed up their data successfully without interruption. In so doing, it safeguarded their business as the threat of ransomware and malware continued to grow. After years of satisfaction with the IPR team, with IPR's professional grade bandwidth capabilities, and with the backup services, this client and IPR began a new conversation about expanding and modernizing their infrastructure.

"This client originally selected IPR because they wanted to be able to grow with us. About a year ago, they did just that," said IPR Secure. *"IT leadership knew they wanted to expand on their data backup service with a full Disaster Recovery as a Service (DRaaS) strategy, so they came to IPR to begin developing a solution."*

IPR hosted the entire team on site at their Wilmington, Delaware headquarters for a CloudBuilder session. CloudBuilder is IPR's program that gives clients the

planning, architecture design, and support to evaluate IT options and bring data management systems and applications safely and successfully into the hybrid cloud era.

"During the CloudBuilder session, we identified more stringent RTOs and RPOs that this firm wanted to be able to meet," said IPR Secure. *"Standards had evolved, and the RTOs and RPOs that were once industry leading now needed to be accelerated so sensitive financial data could be restored within seconds instead of hours."*

Within days of completing the CloudBuilder session, IPR successfully implemented a continuous backup solution using Zerto. Unlike periodic backup, which replicates at regular intervals such as once per day or once per week, Zerto's continuous backup platform replicates data continuously. With Zerto in place, this firm has even greater protection against the rapidly increasing threat of ransomware attacks since data can be restored to the second before an attack occurred, thereby effectively making it as though the attack never happened.

REDUCING RISK WITH A TRUSTED PARTNER

As a result of their long-term relationship with IPR, this financial services firm has been able to meet both the objectives it set at the outset of the engagement as well as new ones that emerged over time.

First, they were able to de-risk their data backup by implementing an automated, enterprise grade data backup solution with DataGuardian. Not only have they reduced the risk that had been present in their manual backup efforts but they have enjoyed successful backup without incident for the duration of their contract with IPR. The decision to move to automated backup had an added benefit of freeing up internal IT team members to focus on other areas of the business including security and business objectives related to the end user experience.

Over time, this financial institution was also able to modernize its IT environment to meet increasing standards of performance and increasing threats with a continuous backup disaster recovery and business continuity strategy powered by Zerto. Now, IT leadership can sleep easier at night knowing the firm is less vulnerable to attacks. And as this firm looks to the future to continue to advance their IT environment, they know they can call IPR at any time to continue to evolve their strategy.

"One of the advantages of IPR is that our clients always know who to call when they have a question," said IPR Secure. *"They have multiple contacts within the company they can call up on a first name basis. We know their business, we know their industry, and we are prepared to support them as they grow."*