



Success Story

Riggs, Counselman, Michaels & Downes: Protecting Critical Customer Data in Any Situation



KEY HIGHLIGHTS

Industry
Insurance

The Challenge

Prepare for any disaster and meet regulatory and customer demands to protect insurance data while enabling excellent business application performance.

The Solution

Replace tape backups with NetApp® AltaVault® cloud-integrated storage.

Benefits

- Enhances DR with cross-continental backups
- Keeps service levels high by sustaining excellent performance for production systems
- Satisfies insurance compliance and audit requirements with end-to-end encryption
- Accelerates backups by decreasing data volumes by more than 7x
- Reduces data protection costs by 52%
- Cuts backup time by 93%, allowing IT to be more strategic

Managing Risk in an Uncertain World

An accident happens, and you call your insurance company. What if you were then told that the information about a claim or your coverage has been lost? Or perhaps some of your personal information has been compromised? This scenario would be more than unsettling. It would be completely unacceptable. After all, your insurance company is there to back you up when the unexpected happens.

For over 125 years, Riggs, Counselman, Michaels & Downes (RCM&D), a Baltimore-based insurance advisory firm, has helped organizations solve complex risk management and employee benefit challenges. The company prides itself on being reliable, privately held, and “detached from Wall Street,” empowering its employees to act expediently on behalf of clients.

The Challenge Safeguarding sensitive insurance details

Success in the insurance industry is built on providing outstanding services while safeguarding policyholder information. Any decision must be based on accurate and timely data.

To provide exceptional customer service and meet government regulations, RCM&D is committed to protecting claims data and other information under any circumstances. The company is subject to SSAE 16 audits and, in situations where it acts as a third-party administrator for medical claims, HIPAA compliance. Some client data must be retained for up to seven years.

“Data backup is a topic that puts everyone to sleep until data loss or compromise happens to them personally,” says Scott E. Berterman, infrastructure architect at the company. “Our job is to be the clients’ first line of defense, and that wouldn’t be possible without fast, failsafe data backup.”

For years, RCM&D backed up its data to tape and paid a third party to transport the tapes off site once a week. As the company’s data grew, this strategy became less effective and more cost prohibitive. If a tape backup failed, there was often not enough time to restart and complete the backup before the next business day. Running tape backups during business hours was not an option, because the traffic could affect performance for clients filing

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claims and accessing information on RCM&D's systems.

Then an unexpected event made it clear that RCM&D needed a new backup and recovery strategy. While the company was considering options to revamp backups, a 5.8 magnitude earthquake shook the eastern United States. “The Virginia earthquake made us reconsider our DR strategy,” says Berterman. “The tape bunker was too close to our primary data center, and we realized that a natural disaster could potentially take out both facilities.”

At the same time, RCM&D was moving its servers and infrastructure to a colocation facility. “I wasn't about to drive to the facility every day to change out tapes,” says Berterman. “I was already spending seven hours a week—almost 20% of my time—managing backups on site. We needed to make a change, and we began looking at the possibility of integrating cloud into our data protection strategy.”

The Solution

Meeting compliance requirements in the cloud

Public cloud was the least expensive option for backups, but initially data security seemed risky. “Our backups must be encrypted, and no third party can have access to the private encryption keys, which can be used to decrypt the data,” explains Berterman. “Some cloud backup vendors offered encryption, but they wouldn't let us manage the keys ourselves. In our industry, that's a deal breaker.”

The company chose NetApp AltaVault, a cloud-integrated storage appliance, to mitigate the security and compliance risks of storing data in the public cloud. “With NetApp AltaVault, we get strong encryption that meets our high standards for safeguarding customer information,” says Berterman. “We can manage the keys locally and rotate them.” The openness and flexibility of the AltaVault solution were also important to RCM&D. “We're not locked into any specific cloud provider's model,” says Berterman.

RCM&D runs its production systems lean and uses NetApp SnapManager® on its NetApp storage systems to take point-in-time copies of virtual machines and data volumes. Then, using SnapMirror®, the Snapshot® copies are replicated to a DR site, where they are backed up to the AltaVault appliance using off-the-shelf backup software. AltaVault caches recent backups locally to disk while vaulting older versions to Amazon Glacier cloud storage.

“Using NetApp SnapManager with AltaVault is fast and saved us money on our backup software,” says Berterman. “Because we're using Snapshot copies, we don't back up directly off our Windows Server systems. That means backups have zero impact on production, and we can use a simple and cost-effective license.”

The solution was also easy to deploy. “It's an easy interface to use, setup was easy, and upgrades are easy,” says Berterman. “It's simple, quick, and doesn't have a lot of dependencies.”

Business Benefits

Keeping customers and auditors happy

Client and internal data is now safe in the cloud. Performance for Microsoft SQL Server databases and business-critical applications such as CRM, Microsoft Exchange, and Microsoft SharePoint is faster because production systems are not slowed by backup traffic. Local restores can be done in minutes, with no performance impact.

“We now have an elegant data protection strategy,” says Berterman. “It speaks well of what we do as a company, and—although NetApp AltaVault is behind the scenes—it helps us serve our customers better. Once we show auditors what we're doing with NetApp AltaVault, any concerns they might have about backing up to the cloud evaporate.”

Efficient, cost-effective data protection

The solution has reduced backup management time by 93%. “I've been able to spend more time optimizing the network for clients connecting in, making sure they have the best possible response times for their claims,” says Berterman.

Data can now be backed up much faster because AltaVault reduces data volumes more than sevenfold by deduplicating the already compressed Snapshot copies. Costs have dropped due to recurring savings on tape media, hardware, labor, software licenses, and archiving and transport services.

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of NetApp AltaVault and SnapManager tools,” says Berterman. “And we’re way ahead of most other insurance companies in terms of our backup and recovery capabilities.”

RCM&D retains the flexibility to use different cloud vendors as pricing and business requirements change. “NetApp AltaVault gives us the flexibility to continually partner with leading cloud service providers,” says Berterman.

Real disaster preparedness

With its long-term archive in the cloud, RCM&D can restore data even in the case of a widespread disaster. It can also test DR capabilities much more easily and more regularly.

“We can’t take chances with client data or our own data,” says Berterman. “NetApp AltaVault was the only viable way for us to adopt a cloud strategy to protect data while satisfying security requirements. In terms of risk management—our core competency—it was one of the best decisions we ever made.”

SOLUTION COMPONENTS

NetApp Products

NetApp AltaVault cloud-integrated storage

NetApp FAS2240 and FAS2040 storage systems

NetApp SnapManager for Microsoft Exchange Server, SQL Server, and SharePoint

NetApp SnapMirror

NetApp Snapshot and SnapRestore® technologies

NetApp Virtual Storage Console for VMware vSphere

Environment

Applications: Microsoft Exchange Server 2010, Microsoft SharePoint Server, CRM software, Terrace Agency Broker System

Database: Microsoft SQL Server 2008 R2

Virtualization: VMware vSphere 5.1

Operating system: Windows Server 2008 R2

Cloud: Amazon Glacier Storage

Protocols

iSCSI, NFS, CIFS



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