

2014 Awards of Excellence Honorable Mention



Information Optimization

Ryan Burgess, BlueShore Financial

Unified data backup and storage cuts costs, eases compliance, enhances recovery, saves time

Autonomy

High-level overview: Using HP, BlueShore Financial has realized the following benefits:

- Significant savings realized from reduced tape archiving and handling requirements.
- Optimized storage capacity by eliminating duplicate files stored across disparate locations
- Saved employees from having to access and recall physical data tapes from a vault
- Improved backup processes, protect data, eliminate wasted resources, shrink network bandwidth costs
- Eased regulatory compliance and disaster recovery

Company: BlueShore Financial is a boutique financial institution providing a full range of personal and business banking, wealth management, insurance and commercial lending solutions. With 12 branches serving approximately 40,000 clients, BlueShore helps clients achieve financial wellness through personalized solutions and expert advice – all delivered in a unique Financial Spa branch environment. BlueShore Financial administers over \$3 billion in assets and consistently ranks among the top 20 financial planning firms in Metro Vancouver.

Contact: Ryan Burgess is the Manager, Technology Infrastructure for BlueShore Financial, and has participated in HP webinars as well as a video and a case study.

Business goals: The quantity of service offered by BlueShore Financial to its customers requires an extensive amount of documentation, all of which is subject to industry regulations regarding privacy and the secure storage of member information. Previously, the institution used a tape-based backup approach involving manual backing up of data onto physical tapes that were

stored in bank offices. This approach posed a number of problems, particularly because the backups had to be performed manually—a lengthy process that was prone to error. The time it took to perform these manual backups created periods of time where information was vulnerable. Additionally, using a physical solution was more costly and unwieldy, and required a large amount of physical space. BlueShore Financial needed a way to tackle these problems and proactively address data protection requirements.

HP Software products implemented: HP Data Protector, powered by HP StoreOnce, delivers a single point of control for deduplication, replication, backup and recovery.

Benefits: BlueShore Financial has minimized its infrastructure costs and compliance challenges by unifying and eliminating duplicate files stored across disparate locations. The solution enhances its backup processes, eliminates wasted resources, shrinks network bandwidth costs and improves backup throughput. BlueShore Financial has secured its entire enterprise data portfolio using HP Autonomy data protection solution. Backups are now performed automatically and at frequent intervals, reducing exposure to data loss. By deploying HP Data Protector with StoreOnce, BlueShore Financial is able to move data around faster and can quickly restore data lost in a disaster to ensure continuous business operations. As a result of the increased storage efficiency from StoreOnce deduplication, BlueShore Financial has been able to achieve its aim of keeping two months of recovery data on site. Additionally, the speed of the HP Autonomy solution has allowed BlueShore Financial to quadruple its recovery points, limiting the effects of potential data disasters in future.

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