

IT-Lifeline uses IBM Tivoli Storage Manager to ensure growing bank's data remains safe.

Challenge

Deliver a predictable, reliable, and fast method of data backup and recovery for Washington Trust Bank's critical data.

Solution

IT-Lifeline customized a secure, managed off-site data backup and recovery solution providing the customer a high degree of confidence.

Key benefits

Shifted the bank's IT focus from managing backup schedules and rotation cycles to managing data in beneficial ways.

Washington Trust Bank knew it faced challenges in the areas of IT data backup and recovery, enough so that it stood out as one of the key concerns for incoming senior vice president and chief information officer, Jim Brockett. "Our biggest challenge was having to manage huge amounts of data and not a lot of confidence in our ability to restore critical systems in a timely manner," he explains. Given any disastrous event, the potential fallout from an extended period of downtime was an enormous risk to not only daily operations, but Washington Trust Bank's compliance with federal regulations. "When you're a bank," Brockett adds, "unless there is a regionally-declared disaster, you're not allowed to be closed without facing severe fines."

IBM Business Partner IT-Lifeline, an outsourced data service provider, worked with bank IT engineers to map out its current data backup and recovery solution, identifying its key issues along the way. "Washington Trust Bank was experiencing a great deal of pain updating and maintaining their existing environment," explains Steve Tabacek, president and chief executive officer of IT-Lifeline. The bank's IT staff acknowledged the growing complexity and expense faced in supporting their existing systems, built around VERITAS™ Backup Exec, VERITAS Net Backup, and an assortment of servers, disk arrays and tape libraries. IT engineers referred to the daily chores of reviewing log files, shuffling tapes and troubleshooting data backup problems as a painful process. File restores and server crashes which required bare-metal recovery of systems were time consuming and technically challenging. Knowing his company could provide a convincing backup and recovery alternative, Tabacek introduced IT-Lifeline services — built around IBM Tivoli® Storage Manager — to Washington Trust Bank. The benefits were quickly apparent to IT staff.

Still, Washington Trust Bank only decided to move forward with the new solution once the executive team got onboard. The bank's executive staff knew that past trends could not continue, noting that every 18-24 months, IT investments mounted as the

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President and CEO,
IT-Lifeline

IT staff tried to keep the existing data backup and recovery environment viable. Newer IT investments were required to address growing data needs before the previous cycle of hardware and software upgrades were depreciated. The IT-Lifeline solution offered the benefits of a Fortune 100 infrastructure, so the bank received the benefit of a high-quality, scalable environment without the huge investment necessary for this level of performance.

IT-Lifeline allowed Washington Trust Bank to create cost savings in other areas as well. By eliminating the arduous manual tasks associated with the current system, the bank achieved a reduction in man-hours needed to support its backup and recovery operations. “We basically outsourced a considerable component of what a lot of our technicians were working on,” Brockett says. “Then we were able to deploy them on other, more important tasks.”

And while it is hard to quantify risk management activities, Brockett recognizes the savings associated with this new solution are undoubtedly significant. “When you mitigate a big risk, you know there’s a payback, even though it’s not always easy to put numbers around it.”

The business of granular data

The IT-Lifeline solution also opened doors to new ways of using data, causing the bank to rethink some core business practices. “We went through all the technical complexities why our IBM-driven solution was better from a sheer data backup perspective,” Tabacek explains, “but then we talked about the power of the product in its ability to help them manage not only their backup information — but all their information.” As a database-driven product, Tivoli Storage Manager allows Washington Trust Bank to extract data and achieve a level of reporting previously unavailable. “Tivoli Storage Manager handed them the ability to clearly understand how much data they have, the rate of growth, and to be able to put a storage policy in place so they can meet regulatory compliance standards.”

The bank’s executive staff recognized the power such granular information gave them over the storage needs of its business. This new ability to understand its data from all facets allowed Washington Trust Bank to put a storage policy in place, managing the amount of storage on hand. “If storage costs were too extreme, they could take a closer look at the storage policy, refine it and eliminate versions,” says Tabacek. “By really understanding what data they had on disk, they are better able to evaluate whether they have a need for all they are storing.” Brockett agrees, saying, “We received a real predictability of costs in a fairly capital- and cost-intensive environment.”

The approach to managing data has created a groundswell of financial institutions adopting a similar strategy. “Washington Trust Bank, in essence, has become a case study we used for implementations at other financial institutions in the banking, finance and insurance industries,” explains Tabacek. “With respect to application and data management, and business continuity, we are breaking new ground.”

This ability to extract and apply data at such a precise level—a by-product of using Tivoli Storage Manager—also benefits IT-Lifeline in other ways. “The features of Tivoli Storage Manager clearly make it the only product on the market that gives us the capability of granular data management,” says Tabacek. “Without it, we’d have no differentiating factor in the marketplace.”

The assurance of recovery

But perhaps the greatest benefit gained by Washington Trust Bank is simply the peace of mind that any lost data can be recovered. “I will tell you that my first six months here, I was concerned about some of our significant client-server applications and our ability to restore those in the event of a significant failure,” Brockett explains. “And I had good reasons to be concerned about that.” Data is now transferred immediately offsite to the IT-Lifeline facility, so backup data is as current as possible if needed. And IT-Lifeline is even used to provide full redundancy to some critical systems in the event of a disaster.

“I was—and still am—of the belief that backup, recovery and storage technologies require more expertise than most midmarket businesses have on staff,” Brockett adds. Outsourcing the functions to IT-Lifeline in effect creates an auxiliary staff with the skill set to ensure the best possible outcomes. The IT-Lifeline Continuity Center is available 24 hours a day to help restore critical operations, ensuring personnel are always available to help—even if the bank’s technical staff is facing adversity or disaster of some nature. But it is also the nature of IT-Lifeline’s own infrastructure that allows them to offer such assurances.

“We’re using an end-to-end IBM solution,” Tabacek explains. “One nice thing about that is the support that IBM provides, which is unparalleled. If we have a problem, it will be resolved quickly—no finger pointing, no questions.” He adds that IBM hardware and software products are integral to the stability of the IT-Lifeline environment. “Hardware and software from IBM form a foundation that can be integrated with other extremely valuable IBM products,” he says. “And this scalability of the environment also allows us, as a business, to operate more efficiently and at a lower cost.”

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Brockett says his company was familiar with the IBM product sets IT-Lifeline employed in the solution, as well as IBM's experience in the financial sector. "There was already a level of comfort there with IBM, and IT-Lifeline's deep understanding of the Tivoli products meant that even if we had liked another product, we trusted what this solution could provide."

Tabacek adds that the IBM products they use also provide an edge during client walkthroughs of their facility. "Our customers see IBM hardware and software in our data center as an asset."

Setting expectations

A surprising outcome of the IT-Lifeline solution is the enhanced understanding shared between Washington Trust Bank's executive and IT staffs. "There is a gap between what executive management sees or expects at the time of recovery after some sort of adversity," explains Tabacek, "and how IT engineers see things and are capable of performing." Using their IBM infrastructure, IT-Lifeline says they are now able to establish more realistic expectations. "We have demonstrated superior recovery capabilities, so we can now set executive expectations to that proven benchmark."

Far-reaching impacts

Predictability of costs, a shift in the management and use of its data, and the assurance that recovery of data can be managed in a timely, cost-effective manner. "At the end of the day, we're creating more than just a plain-Jane, vanilla backup product," concludes Tabacek. "It's designed to gain operating efficiencies in a production environment." He believes the infrastructure IT-Lifeline built using Tivoli Storage Manager will have far-reaching effects across the financial sector.

As for Jim Brockett, he agrees that the partnership with IT-Lifeline has been a positive experience. "It's hard to get too excited about disaster recovery, backup and restore," he says, laughing. "But I can tell you, I sure sleep better at night."

For more information

To find out more about IBM Tivoli software products, visit:

ibm.com/tivoli

To learn more about IT-Lifeline, visit:

www.itlifeline.net

For more information on Washington Trust Bank, visit:

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