

Financial Services Firm

SSE Brings Reliability, Stability and Security to Local Financial Services Firm Handling Critical Client Assets

Client Need

A St. Louis based investment management firm, managing over \$500 million in private client assets, was experiencing frequent performance and reliability problems with their network systems, including remote access issues and challenges with their email system. The investment firm began a search for a new IT provider since their current IT provider was not meeting the business technology needs of the company. During their search, SSE was recommended to them by another financial management company (Charles Schwab Corporation).

Initially, SSE was commissioned with the following tasks:

- Provide overall stability to the network
- Allow for easy, consistent remote access
- Fix the inconsistency issues with the email system

After SSE did a brief assessment of the financial firms IT systems, it was discovered that the previous vendor had configured all of the hardware, features and functions on one server, which had completely overloaded the system. This single server was trying to respond to every need of the business and was not able to handle the heavy workflow to allow for seamless daily operations of the business.

The SSE Solution

SSE's first initiative was to completely redesign the network infrastructure of the company. Core functions, such as network management, email, security and user access were divided into their own systems. A separate financial management system was also created. By creating these

“ Computer availability, reliability and security are critical to the success of our business, our clients and the roughly billion dollars we manage on their behalf. SSE has been an outstanding partner; ensuring that our computers and network are available 100% of the time. The PretechtSM monitoring product has reduced the personnel time required to support our network, and has saved us money.

- Michael L. CEPA, Partner

divisions, reliability and performance problems were solved. SSE also set up a remote capability for this client so all employees had the capability to connect to the office from any remote locations.

After the network was stabilized, SSE then put its proprietary monitoring and network management tools, the Pretechtsm system, in place in order to provide ongoing proactive network support to the financial firm. This included 24/7 performance monitoring, maintenance, security, troubleshooting/resolution and annual technology reviews to plan for future business needs and ensure IT alignment with the firm's overarching goals.

In addition to ongoing support, SSE continues to assist the financial services firm with various IT projects to continually

Continued on back

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improve the efficiency of their operations. Over the years, SSE has upgraded servers and workstations, installed more robust network switching equipment, deployed a new firewall, anti-virus solution, and cloud data backup service, and implemented a secure FTP solution with necessary security in place to protect the confidential assets of the financial services firm.

Recently, SSE designed a new Virtual Server Cluster Solution for the financial services firm. By applying engineering and scientific disciplines, SSE made a recommendation to re-architect their server/network environment to provide more reliability while lowering ongoing support costs. This solution will support the financial services firm over the next 3 to 5 years and will include the following benefits:

- A decrease in physical server infrastructure by 40% over the next three years
- Deployment of a clustered virtualization solution based on Microsoft Hyper-V to give hardware redundancy for nearly all of the server infrastructure
- Deployment of a new updated database server to comply with proprietary software requirements
- Implementation of remote desktop services infrastructure to allow for remote access
- Deployment of a new file server solution

Client Benefits

The financial firm was delighted to now have SSE as its IT provider. The performance and reliability of the daily business operations were so significantly improved after SSE completed the initial infrastructure redesign, the SSE network engineers actually received a standing ovation from the employees throughout the client's office!

Since then.....

Peace of Mind: Replacing the servers, eliminating problems and providing constant "uptime" gave the financial firm complete peace of mind and changed the dynamic from expecting the server to crash any minute to experiencing continuous business flow during daily operations.

Increased Productivity: After SSE restored the client's network system, the productivity level increased greatly. Employees were able to work efficiently without constant disruption due to unreliable network systems. In addition, with new remote capabilities, employees could even work from the comfort of their home or in the field as necessary.

Reliable Support: With SSE's proprietary Pretechsm system, 24/7 real time monitoring ensured most problems are detected and fixed before escalating into catastrophes, often from a remote location with no disruption to business functions.

Efficient Security: With deploying a new firewall and stabilizing the network to include making sure all security holes were closed, the financial services firm can rest assured they are less vulnerable to security breaches, which is critical due to the nature of their business and protecting their clients personal information.

Improved Infrastructure Design: Switching to a Virtual Server Cluster Solution allowed the financial firm to reduce physical infrastructure, lowering ongoing support costs in the overall hardware replenishment lifecycle.

