



# CASE STUDY

## AmericanWest Bank Transitions to Reliable Hosting Solution with Strafford

A business-focused community bank committed to providing truly exceptional client experiences was working with a consulting firm that could no longer maintain their hosting agreement of Oracle Essbase. They needed to find a new, more reliable firm quickly.

Headquartered in Spokane, Washington, AmericanWest Bank (AWB) believes in the hands-on approach with their customers. AWB works with individuals and businesses on meeting long- and short-term financial goals. The company offers a full suite of commercial and business products and services, including treasury management and a complete offering of consumer deposits and loans, including mortgage services.

### In Need of a Reliable Hosting Provider

Three years ago, AmericanWest Bank decided to implement Essbase, an OLAP (Online Analytical Processing) Server from Oracle, as its financial reporting solution. AWB found a hosting provider and launched Essbase. As time passed, AWB encountered numerous outages and downtime with the service, which were unacceptable.

Last year, AWB had two separate week-long outages at month-end close. "We just can't afford to have that kind of downtime," said Bret Gelhausen, senior management reporting analyst for AmericanWest Bank. "It's important for us to have the system available."

During this same period, AWB was working on renewing their hosting agreement with the hosting firm and wanted to add additional features to the software. "About halfway through the process," Gelhausen said, "we noticed the people we were working with were no longer at the company. For instance, the person in charge of contracts left the company." When Gelhausen had technical questions,

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**Business Process:** Financial Reporting

**Technology:** Oracle Essbase

**Business Challenge:** Working with unreliable consulting firm who could no longer maintain the bank's hosting agreement of Oracle Essbase

**Strafford Solution:** Implement up-graded version of Essbase, manage in the cloud through Amazon Web Services, while migrating the bank away from other hosting company efficiently

**Result:** Added reporting functionality with improved system speed, efficiency, availability and reliability. Collaborating on forthcoming project to implement next-generation budgeting, forecasting, and profitability solution, also hosted in the cloud.

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*~ Bret Gelhausen*

he found that he was no longer dealing with the IT department, but the company's president, who wasn't an IT professional.

AWB needed to be with a company they knew to be solvent, without extreme attrition, in good standing, and around for the long term.

After discussing options with their IT department, AWB knew they wanted to stay with a hosted solution, similar to what they had. "We contacted Oracle and expressed our concerns," Gelhausen said. "They worked to connect us with other potential providers who could help us through an implementation." Strafford was on the short list.

"We did due diligence between a couple of companies," Gelhausen said. He was immediately impressed with Strafford in his first conversation with a consultant. "The consultant was very forthright and very easy to talk to," he said. "I felt like I wasn't getting a sales pitch, which was important."

Another item that impressed Gelhausen was when asking Strafford if they had Oracle DBAs available to work in-house, Strafford didn't hesitate to say yes. "The other company wasn't as straightforward or clear on whether they had Oracle DBAs in-house. Which, given the problems we had with our old provider, was extremely important to us."

AWB chose Strafford and the project started immediately.

### **Having Strafford as a Partner**

The most unique aspect of this project, Gelhausen said, was that access to AWB data was only through their console, since they didn't want to raise a red flag to the old provider. "For all we knew, they could shut their doors and leave us without content," he said.

The first task Strafford helped AWB sort out was how to get the bank's complete data without involving the old provider. The Strafford consultant worked with his contacts and developed a plan that involved using tools to develop and run extracts to obtain the data.

AWB used the tools, ran the processes, and gave the extracts to Strafford. "They had a test environment up for us in about a week," Gelhausen said.

The bank wanted a cloud-hosted solution since they didn't have and didn't want an in-house Oracle DBA. "We aren't an Oracle shop," Gelhausen said. "In fact, we use mostly SQL/Microsoft. So we had two options: we could hire someone to be a full-time Oracle DBA or we could do a hosted solution."

AWB signed a contract with Strafford for the hosting solution. They quickly ironed out some items related to hosting through a fully configured Amazon Web Services-based server cluster, including regular backup and recovery. And they worked with their IT group on a slight shift to a new methodology for network and operating system monitoring. "For all intents and purposes, it was a very smooth transition."

### **Implementing the Solution**

AWB retained its former environment and ran it in tandem with the new environment hosted through Strafford for a month to double check data consistency. After a month, AWB eliminated the service with its old provider.

The bank noticed a lot more functionality with the new implementation right away. "Strafford had been more current with their updates versus our old provider," Gelhausen said. "We immediately noticed some tools that were available in the newer

version, along with improved efficiency.”

“Because we had a lot of our calcs already built,” Gelhausen said, “Strafford had to manage those during the transition.” Strafford also set up secure access via VPN and a hosting help desk. They also did some fine-tuning to get optimum system performance, and helped AWB set up automation scripts.

“It was a relief to deal with a company that was really on top of things,” Gelhausen said. “They knew what they were doing and could speak to what they were going to do. Whatever it took to get the replication up and running is what Strafford did.”

### Seeing Improvements

Since partnering with Strafford and implementing the updated Essbase, Gelhausen has been impressed with system availability.

“With the outages we had had, downtime was a big concern,” Gelhausen said. “We haven’t had any downtime since implementing with Strafford.”

Any issues AWB has encountered have been quickly addressed and resolved. Gelhausen finds that system maintenance works out well with Strafford being on the east coast, while AWB is on the west coast. Since a lot of the system maintenance is done in the morning, it’s completed before the bank opens.

Gelhausen is also impressed with Strafford’s responsiveness. “I haven’t had a situation where I can’t get ahold of someone,” he said. “I’m not a fan of getting stuck in automated voice message systems. The fact that I can call up and talk to someone in person is invaluable to me.”

Having the current version of Essbase available has improved process performance immensely. “I have Essbase retrievals that used to take five minutes which now only take ten seconds,” Gelhausen said.

From a cost-savings standpoint, it made a lot of cost sense for AWB to pay a few thousand dollars per month for a hosted solution versus what can realistically cost upward of \$80K to 100K per year for an Oracle DBA. “For the cost savings there, it was well worth it,” Gelhausen said.

### Future Plans

Based on the experience AWB had with Strafford for the Hyperion Essbase project, the bank wanted to partner with Strafford on its next project.

“We’re already working with Strafford on a new project,” Gelhausen said. AWB and Strafford are working together on the implementation of next-generation budgeting, forecasting, and profitability solutions. After Strafford demonstrated a few solutions, AWB purchased Hyperion Planning, Hyperion Workforce Planning, Hyperion Capital Asset Planning and Hyperion Profitability & Cost Management, then got underway with implementation. The project is expected to be completed within eight to twelve months.

The new solutions will also be hosted in the cloud.

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