

## First Foundation



“DynTek is an invaluable partner, combining an understanding of financial services with a holistic view of technology, particularly the latest and greatest innovations. While most vertical resellers focus narrowly on banking technology, DynTek brings us new ideas from across the business spectrum. In fact, every solution proposed to us by a vertical consultant was already presented by DynTek — six months before.”

**Adrian Darmawan**  
Sr. Vice President and CTO  
First Foundation

# First Foundation manages its mobile financial enterprise with a Citrix solution from DynTek

## PROFILE

First Foundation, Inc., a financial services company founded in 1990, provides integrated investment management, wealth planning, consulting, trust and banking services, primarily to high-net-worth individuals and businesses. The company is headquartered in Irvine, California, with six other offices in the state and a branch in Las Vegas, Nevada. First Foundation employs approximately 220 people.

## CHALLENGE

When Adrian Darmawan joined First Foundation as senior vice president and chief technology officer, the organization was running distributed PCs, with all their challenges of burdensome administration and high total cost of ownership. An attempt had been made to implement desktop virtualization with VMware View, but it did not work well. “At one new branch, which was running View exclusively, people complained loudly about slow performance and other issues,” he said.

Darmawan proposed a better virtualization solution — XenDesktop — based on his experience at a previous company. “That bank was concerned about potential computer theft and loss of corporate data because a branch had already been robbed of flat-screen TVs. DynTek, the IT services partner we had engaged to provide consulting services for our Cisco environment, introduced us to Citrix virtualization. Citrix technology not only addressed endpoint security concerns, but also facilitated desktop delivery to new employees from an earlier acquisition. I was confident that XenDesktop would solve similar issues at First Foundation, and also help us migrate to Windows 7 without a major PC refresh.”

## SOLUTION

With senior leadership buy-in, Darmawan brought in DynTek to assist with the XenDesktop deployment. Currently, the IT team delivers six different Windows 7 virtual desktops based on job roles. Core apps include the Fiserv Precision bank platform. Instead of being forced to upgrade more than 100 PCs to support Windows 7, the IT team is gradually replacing them with lower-cost thin clients. Other IT benefits are simplified management and system reliability. “Our system administrator centrally manages six golden images rather than hundreds of endpoints,” Darmawan said.

A top business advantage of XenDesktop was demonstrated during First Foundation’s recent merger with Palm Desert-based Desert Commercial Bank. “Citrix virtualization makes it easy to quickly deliver a virtual desktop to new employees, instead of having to wait for our core bank system vendor to make the conversion. Workers can run their First Foundation desktop on one screen and their existing system on another, side-by-side, while the vendor catches up. It’s a huge benefit for productivity and rapid assimilation of the new entity.”

## Key Benefits

- Provides an integrated solution for mobility management
- Supports regulatory compliance
- Delivers a satisfying user experience on corporate iPhones
- Simplifies business continuity planning
- Replaces insecure consumer file sharing services

“Financial services companies must satisfy regulators regarding the security of data on mobile devices. Citrix XenMobile provides the ideal solution to these challenges. We’re happy to support First Foundation’s mobility strategy and look forward to continuing our strong partnership.”

**Donovan Pearman**  
*Principal Architect,  
End Point Computing Solutions  
DynTek Services, Inc.*



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With the virtualization environment running smoothly and a strong relationship with DynTek in place, Darmawan turned to another challenge — increasingly stringent regulatory requirements for mobility management. “First Foundation has had mobile users for years, including relationship managers, private bankers, executives and the support team. They were issued BlackBerry devices and now have corporate iPhones. However, government and industry regulators are taking a closer look at mobile device management. They audit financial institutions like First Foundation for security controls over data on mobile devices.” In addition to seeking the best solution for mobile device and app management, Darmawan wanted to replace Dropbox, the consumer file sharing service used by employees, with a secure, enterprise-grade solution.

Based on the trusted advice of DynTek and internal evaluations of competitive enterprise mobility management (EMM) products, including AirWatch and BlackBerry BES12, Darmawan chose XenMobile Enterprise. This complete, integrated EMM solution provides mobile device and application management, secure file sync and share with ShareFile, and the Worx family of mobile business productivity apps.

Donovan Pearman, DynTek’s principal architect, End Point Computing Solutions, said, “We advocated XenMobile Enterprise because it’s the most robust EMM solution on the market, and it met First Foundation’s requirement for full integration of mobile device, app and data management capabilities. Our technology expertise and financial services experience allowed us to make a proposal tailored to the customer’s specific needs.”

Darmawan concurred, “We had confidence in the ability of XenMobile to meet tough compliance requirements because DynTek recommended it, and they are very familiar with our industry and its regulations. Plus, it’s part of the Citrix portfolio.”

### RESULTS

At DynTek’s suggestion, First Foundation waited until the latest version of XenMobile was available to gain the newest features. In the meantime, the IT team implemented ShareFile to replace Dropbox. “We really value the ability to keep attachments off employee iPhones. With ShareFile, you send a link to a file securely stored in our datacenter, not an attachment, so documents are not downloaded onto the device where they could be at risk.”

Darmawan anticipates other important benefits from the new solution. “Our business continuity team used to issue printed wallet cards containing emergency information to all employees. As the company grew, it became cumbersome to update and distribute these cards. So we decided to publish the information on our intranet. With the WorxWeb browser app, which provides access to intranet sites and is secured according to our IT policy, mobile users can get the latest emergency details from anywhere.”

Another XenMobile value-add is the ability to keep corporate apps and data completely separate from personal apps and data on the same mobile device, using MDX app container technology. “We do not support ‘bring your own’ (BYO) devices. On the other hand, we recognize that a locked-down, corporate iPhone won’t be popular with employees. They want to use the same device for business and personal activities. XenMobile isolates corporate resources from personal information, and provides IT controls such as selective remote wipe if an employee leaves the company. This approach combines security with the convenience of a single mobile device. Users love that — and so do we.”