



CASE STUDY

Sentinel Benefits & Financial Group Delivers on Customer Experience Promise with Actifio

Executive summary

In an industry where client experience can be a core differentiator, Sentinel Benefits & Financial Group considers itself a craftsman-like company. From senior levels down, throughout the organization, Sentinel partners with customers to make the process of managing investments, retirement plans and other benefits easy. Whether end users want to check their 401K balances on their laptops, dial into a call center to talk about their short-term investments or use a mobile device to answer a question about insurance coverage, Sentinel promises that its technology can make those inquiries seamless.

In a data-heavy business, that level of customer experience hinges on availability – for both client and operational data. Sentinel wanted to improve its disaster recovery and business continuity (DRBC) position beyond what was possible with tape backup.

The idea, according to Sentinel Benefits CIO Todd Larson, was, “If the lights go off, they come back on quickly, and the flow of data does not stop.” Sentinel wanted more than just backup, however. The company needed both resiliency and agility, so its employees, customers and their end users could get to relevant data when and where they needed it. “Our level of innovation and operational forethought has to be on game, and our SLAs are stringent,” said Larson. This is how Sentinel came to adopt Actifio Sky and Enterprise Data as a Service (EDaaS).



WHO: Sentinel Benefits & Financial Group

CHALLENGES: Reliance on tape backup made for burdensome administration and low confidence in restores; recovery of large databases took more than a day

IT ENVIRONMENT: VMware, Oracle on Windows, SQL Server, Citrix legacy VMs, proprietary applications

SOLUTION: Actifio Enterprise Data as a Service (EDaaS), Actifio Sky

BENEFITS:

- Multi-TB database recovery time slashed from more than 24 hours to minutes
- Data reduction ratio of 37:1
- Eliminated need for tape and Commvault
- For less than the cost of a backup solution, obtained: data copy virtualization, data protection with rapid recovery, instant ability to test applications and off-site disaster recovery

Company Overview

From comprehensive retirement plans to group health insurance to reimbursement accounts to financial planning, Sentinel is a single, expert resource that helps companies and individuals create holistic and meaningful strategies in line with their organizational and financial goals. For 30 years, the Massachusetts-based company has delivered employee benefit consulting and administration with a personal touch. Today, Sentinel serves thousands of businesses across the Northeast.

Because Sentinel provides so many kinds of services that are so dependent on data availability, the company needs to stay innovative about how it operates. Sentinel uses a mix of on-premise, cloud-based and SaaS-based applications and platforms to automate onboarding, distribution processes and more. Systems integration is a huge focus for the IT team, as are the security, protection and availability of client data. That team, comprised of 200 employees across three sites, is managing 60 VMs with vSphere; 3 TB of Oracle data; 10 instances across production, test and development; and 140 legacy VMs.

The Challenge

In 2012, Sentinel's environment was only 30 percent virtualized on Citrix XenServers, and its IT staff was heavily focused on system administration. The DR plan came down to tape alone. The company was backing up data with Commvault, and the result was burdensome tape administration and low confidence in the restores. The recovery process was painfully slow; a complete restore commonly required four days. Once, after a particularly challenging event, it took the team two weeks of herculean effort to rebuild an altered database.

"The company needed data protection improvements that checked some important boxes: deduplication, compression, efficient replication and rapid restores," said Larson. "However, we needed more than just backup. We wanted to get to data on demand, while enabling our test/dev processes. That's what led us to Actifio and Congruity. They worked hard to understand what we wanted and why it was important for our business."

After conducting an intensive lab testing process, Sentinel chose Actifio.

"We were looking for a cost-effective solution and we found it through two great relationships with Congruity and Actifio," said Larson.

The Solution

"In financial services, things change quickly. We need to be able to move quickly and without interruption from a data availability perspective," said Larson. "Actifio is a trusted partner for us in that effort. With Actifio, we've integrated our back-end technology to create the high-availability solutions our customers expect."

Sentinel initially deployed two Actifio 100T CDS systems – one appliance for the company's Boston-based data center and the other for its DR site in Pennsylvania. The system replicated only unique, compressed blocks and managed 48 TB of integrated storage, protecting all of Sentinel's VMware, Oracle and Exchange mailbox data. For highest priority data, snapshots were taken # times per day, every day, and stored for two days. Dedupe backups were taken daily, weekly and monthly, and kept for one day, five weeks and one year, respectively.

Today, Sentinel uses Actifio Sky virtual appliances to further extend its flexibility amid continuously growing data stores. Says Larson, "Actifio delivers redundancy and quick recovery of large sets of data. That's why we bought it. That's how we use it. It gives us the ability to sleep at night, and operationally, it's become part of the lifeblood of the firm because we can better service internal clients, as well as external ones. Actifio has helped us meet our mission to make sure information is always accessible."

The Benefits

Actifio helped Sentinel create high-availability customer data solutions. For less than the cost of a backup product, Sentinel got data copy virtualization, data protection with rapid recovery, instant ability to test applications and off-site DR. Since deploying Actifio, the company also significantly reduced the administrative time of its team, cut its data 37:1 and slashed recovery time.

"Restore and recovery of a multi-TB Oracle database was quite a project that would take us a day-plus due to the complexity and the amount of data," said Larson. "But with Actifio, we've cut that to minutes. Actifio doesn't just offer us an operational savings and the given safety net; it's the speed to recovery, which for me, from a risk perspective, is what it's all about."