CASE STUDY

Migrating a Bank's Current IT Infrastructure and Securing Customer Data

BACKGROUND

Many small businesses do not have the resources or expertise required to effectively manage their IT needs. As a result, many look outside their organization for help in augmenting these services. However, the results from these types of partnerships can differ greatly. Many IT service firms operate as single person entities and thus are unable to address all the needs of a small organization in a constantly changing technical environment.

THE PROBLEM

When the new Chief Operating Officer took his position at the bank, he began to evaluate the current operations. Like with any mature organization, a fresh set of eyes or a new level of scrutiny can bring welcomed change. In the case of the bank's IT support, the COO had a number of concerns. First and foremost, support was handled by a one-man company.

Users argued that complaint resolution took an inordinate amount of time and that technical lapses were impacting overall productivity. When the COO analyzed the bank's security measures, he noticed several gaps in security and little attention was paid to the bank's critical technology infrastructure. When the board was presented with an initial report on the state of the bank's IT infrastructure, they demanded immediate action.

The bank contacted NetCenergy to perform an audit of the current situation.

THE SOLUTION

NetCenergy first sought to better understand the bank's business.

NetCenergy:

- Deployed a technical team member to conduct a full in-person assessment of the bank's technical systems and met with the bank's leaders to gain a complete understanding of their business goals and objectives

- Created a clear roadmap for how the organization was currently using technology, and how they would like to leverage it in the future

- Tailored a specific set of recommendations and an implementation plan that would ideally suit the needs of the bank, which included the level of investment required to upgrade the bank's current systems, which pieces of the bank's current system could remain intact, and the increased capabilities and security advantages of the proposed system

- Created a contingency plan considering the unlikely possibility that the current IT infrastructure vendor might not cooperate with the transition.

NetCenergy's comprehensive plan also provided detail on the different layers of IT infrastructure that would be implemented in order to ensure a successful program. NetCenergy stressed security, proactive monitoring, and user training as integral pieces to this new IT service program.

THE RESULTS

The bank's leadership team appreciated the business-first mentality that drove the recommendations, and was assured about the IT migration thanks to NetCenergy's contingency plan.

NetCenergy then conducted:

- A seamless transition of the bank's IT equipment and operations

- On-going security and fully monitored support under a fixed monthly fee agreement

- Capital budget planning assistance to help the bank plan for and understand its future technology needs

- Regularly scheduled security awareness trainings

- Quarterly business reviews to discuss business changes at the bank and draft IT budgets

The migration process went smoothly. Of the partnership with NetCenergy, the bank's leadership team said: "we now have peace of mind that our customer's data is fully secure, regularly monitored, and effectively managed." Since the migration, the NetCenergy team became fully integrated with the bank's team through regularly trainings and reviews. The partnership has helped the bank increase productivity and security for employees and customers alike.

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