



WELLINGTON WEST INVESTS WISELY IN SAVING TIME AND MONEY WITH KACE™

THE CAMERON GROUP
AT
WELLINGTON WEST
Financial Services Inc.

KBOX™ helps leading financial management firm meet goal of improved service levels while saving time and money

BACKGROUND

Wellington West Capital Inc., with more than 500 employees, is one of Canada's leading independent financial management and investment advisory companies with 27 office locations across Canada plus Los Angeles. The investment banking professionals at Wellington manage more than 30,000 client accounts. A nine-person staff, including four people on dedicated help desk and two custom application developers, supports all of IT. Three years ago the support team was the same size and managed the network application rollouts and patch management "by sneakernet."

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CHALLENGE

Needing better ways to save time on manual systems management tasks

With the firm experiencing 25 percent annual growth in accounts under management, Wellington was able to scale its technology infrastructure to keep pace without increasing headcount dedicated to support. The challenge was how to automate many of the routine tasks that traditionally were completed manually, said David Boissonneault, senior information technology specialist. In fact, said Boissonneault, the goal of automation was to exceed historic service levels, not just keep a cap on headcount. "Really we were just patching the systems," he recalled. "With automation, we wanted to investigate new and better ways of doing things."

On time delivery of broker quotes key to the business

Wellington historically relied on IBM for most of its server and desktop hardware. The IT team managed about 30 IBM servers, most running Microsoft Windows Server 2003 with some still on Windows Server 2000. To deliver real-time quotes to brokers, the bank relied on a two-server UNIX system cluster running SCO UNIX and a custom-built application. A Linux server ran the XMPP application internally. The networking hardware was a mix of HP and Cisco with the bank moving to standardize on Cisco layer 2 networking. Wellington managed everything countrywide through a Windows Active Directory 2003 domain.

Desktops across the company were either on Microsoft Windows 2000 Pro or XP Pro. Applications included Office 2003, a CRM package, Thomson One, a slew of Web-based

applications including Croesus, and McAfee for antivirus, among others.

Vendor point solutions not a comprehensive answer

Boissonneault first turned to IBM for help in investigating automation solutions for managing the Wellington IT systems. They recommended IBM Director. "Unfortunately, the only thing IBM director did was image PCs," he said. It was a start. And when Microsoft released Windows Update Services, Boissonneault was happy to have two of his three sneakernet tasks largely automated. But he still didn't have reliable application deployment. "It wasn't an ideal system," recalled Boissonneault.

KACE TIME: WELLINGTON WEST

DEPLOYMENT

One day

TRAINING

8 hour web-based training

TIME AND MONEY SAVINGS

- Instant inventories for 27 locations
- Automated compliance enforcement
- Increased service levels without increased staff
- More time available for strategic initiatives

When he moved his systems to using a group policy object with Active Directory, he saw it was time to reconsider the partial automation solutions he was running from IBM and Microsoft.

"We had no feedback on what was actually installing and what was failing," he said. "Did this get installed on every PC? You'd look around and find it didn't get into half of our PCs. We had to look for a solution to deploy software reliably."

No time for cost prohibitive software alternatives

Wellington had evaluated the original IBM Director solution for imaging over about three months. The investment firm used it for a year but was disappointed in actual performance versus the features promised in advance.

In fact, when he looked at the software delivery module with IBM Director, he found it would cost him an extra \$60 per system managed and it only delivered IBM software. He gave himself more time to explore an all-in-one solution, about half a year. The most important criteria in this evaluation were that the product had to integrate with Active Directory. The first product he considered failed the AD test, Boissonneault said. The next, Insystec, looked good on paper but didn't work. Dell came to Wellington and pushed Altiris. But it was too heavy, expensive and required a lot of implementation. Finally, he looked at Microsoft SMS. But it was far too expensive and didn't do everything he wanted.

SOLUTION

KBOX saves time and money through its comprehensive appliance-based approach

The Boissonneault came across KACE by chance on a Web site called Appdeploy.com. He liked the idea of a dedicated appliance that met all of his automation requirements. He called KACE and quickly began a Test Drive using a KBOX running remotely to put through a thorough evaluation.

"It did everything that it claimed to do," Boissonneault said. "Even with a box that was not on our network physically, everything worked as it should. Everything we wanted to accomplish was possible through this KBOX." The Wellington IT team relies on the KBOX now for a wide variety of end-to-end automation tasks:

- Day to day for software enforcement
- Application distribution so that every PC is always current
- Software and hardware audit
- Help desk staff use KBOX extensively for support. Now if a user calls in, the help desk knows who the person is and can click on an icon that launches VNC for remote control so users don't even need to give feedback.

Eliminating repetitive tasks frees time for strategic initiatives

KBOX automates the repetitive tasks so Wellington IT staff is freed up to focus on more interesting and strategic items.

"The KBOX is like having an employee sitting in the corner doing all the things that no one else wants to do" said Boissonneault.

"KBOX does so much. It's a very useful appliance. It's perfect if you need everything. And you get so much bang for your buck."

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KBOX eliminates time previously spent to manually inventory 27 offices

The audit feature of the KBOX was a pleasant surprise to Boissonneault and his team. In an instant, they can capture exactly what hardware and software are on their network. They no longer have to perform physical inventories at 27 different offices. In addition, KBOX has simplified warranty management. A quick check of PCs on the inventory against the hardware vendor's support Web site reveals instantly what computers are coming off their warranty period.

"The KBOX does so much," he said. "It's a very useful appliance. It's perfect if you need everything. And you get so much bang for your buck." Boissonneault estimates that his help desk staff would have doubled in size over three years if Wellington had not deployed KACE.

"We didn't have to make any business case for KACE," he said. "Everyone knew there was a need. I just explained the results of dropping KBOX into the environments. Doing things manually, everything crawled to a halt. We were always in reactive mode. That is hard to maintain when you are focused on growth."

SAVE TIME AND MONEY WITH KBOX SYSTEMS MANAGEMENT APPLIANCE

Accelerated System Test and Acquisition

- Used remote KBOX system for pre-purchase "test drive"

Streamlined Deployment and Training

- Plug and play installation and deployment
- Onsite web-based training

Immediate ROI

- Instant inventories for 27 locations
- Automated compliance enforcement
- Increased service levels without increased staff
- More time available for strategic initiatives



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