

## INVESTMENT MANAGEMENT FIRM

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**INFRASTRUCTURE AND TRADING INDUSTRY EXPERTISE IMPROVE SYSTEM RELIABILITY AND PERFORMANCE—AND, ULTIMATELY, BUSINESS CONTINUITY.**

### THE CLIENT.

The client is a private investment management firm based in Chicago, Illinois.

### A COMPLETE INFRASTRUCTURE UPGRADE.

This investment management firm's operations ran on an older, out-of-date technology infrastructure that was low on disk space, presenting several performance issues. As traders, the firm's personnel required fast access to applications and other business resources; yet, the intensity of software applications reduced desktop performance and affected business continuity. In addition, the firm's back-up system was prone to failure, and the organization experienced spam issues that it was unable to resolve.

The firm sought a managed services provider to assess its infrastructure and provide recommendations and vendor pricing for a complete infrastructure upgrade—including new servers, network equipment and ISP cutover, and desktop computer replacement. Furthermore, the provider needed to understand trading schedules and perform the upgrade work during non-trading hours, including late nights and weekends.

The investment management firm selected West Monroe Partners as its managed services partner. West Monroe Partners offered substantial experience in the trading industry, including in-depth knowledge of trading operations and systems, as well as a willingness to perform its work in a way that would not affect the firm's business. In addition, West Monroe Partners' infrastructure and network experience provided the client with a variety of technology and vendor options that would suit both its business needs and its budget. Finally, West Monroe Partners was able to provide ongoing support, as needed, to maintain the firm's new infrastructure.

### AN OPTIMAL MIX OF PERFORMANCE, QUALITY, AND COST.

West Monroe Partners began by conducting a comprehensive assessment of the investment firm's IT infrastructure. This enabled its team to understand the environment and the applications in use, as well as to provide the firm's management team with a variety of recommendations for upgrading the infrastructure. West Monroe Partners then worked with many hardware and software vendors to help the investment firm select the optimal mix of technology performance, quality, and cost.

West Monroe Partners then established a detailed implementation plan and coordinated with the firm's trading schedule to complete the:

- ◆ Successful cutover to a new Internet services provider.
- ◆ Implementation of new servers and desktops.
- ◆ Migration of data to new servers and desktops.

In addition, West Monroe Partners implemented a new anti-virus/anti-spam solution that reduced issues dramatically, and it installed a new back-up system to ensure data safety. Finally, West Monroe Partners worked with the investment firm to implement heightened security policies, including RADIUS VPN authentication, to allow users to access the network from outside the office.

By working with West Monroe Partners, the investment firm has improved the quality and reliability of its infrastructure significantly. Its traders have the speed and performance they need to operate effectively in the fast-paced, high-stakes investment arena. Because West Monroe Partners was sensitive to and able to work around the firm's trading schedule, the client was able to complete the upgrade with no downtime or impact on its trading operations. And, the firm now can operate with the peace of mind that it has a reliable back-up system in place and a responsive partner on call to support it.

West Monroe Partners is an international, full-service business and technology consulting firm focused on guiding organizations through projects that fundamentally transform their business. With the experience to create the most ambitious visions as well as the skills to implement the smallest details of our clients' most critical projects, West Monroe Partners is a proven provider of growth and efficiency to large enterprises, as well as more nimble middle-market organizations. Our more than 300 consulting professionals drive better business results by harnessing our collective experience across a range of industries, serving clients out of offices across the United States and Canada.