

CUSTOMER NEEDS AND STRATEGIES

A Case Study in Backup and Recovery

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IDC OPINION

Making the case for backup solutions requires prioritizing individual employee data backup as high, if not higher, than other internal IT support initiatives. This means not only the increase in return on investment (ROI) that may come from lower service desk costs as employees recover their own data but also the decrease in costs as employees stay productive in managing their own data. For proactive IT organizations, backup of end-user data can be a way to control costs and support the end user. A financial services organization in particular that operated a backup and recovery solution from their service desk replaced an existing software backup solution with a solution from another vendor in order to do the following:

- Lower costs. Costs were lowered by lower setup times to administer the product and decrease the amount of time necessary to back up and restore end-user data.
 - Protect customer data. End-user data was protected by backup software that made the case stronger for data protection.
 - Increase flexibility. The company's previous backup solution only imaged a solution. Imaging in this case only provided enough flexibility to manage the basic template for the company, but not enough flexibility with each individual end user's data.
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IN THIS STUDY

This IDC document discusses backup and recovery in general, then drills down to discuss how a specific company switched from one backup and recovery solution to another. This document discusses factors that went into the company's decision and explains what the company gets out of its new solution that it didn't before.

SITUATION OVERVIEW

Introduction

Being able to recover from disasters that befall organizations is one of an IT manager's primary responsibilities. So it is not just important to back up data, but to also successfully restore data if it's initially destroyed or unusable. Backup and recovery is a challenge because of the following:

- ☒ **Ease of use.** Solutions must be easy to use since training budgets are always limited and learning curves tend to be short, especially for organizations that support small companies (those with less than 1,000 employees).
- ☒ **Scalability.** A total solution must allow organizations to move relatively easily from backing up dozens of machines to hundreds or thousands without having to generate a new architecture for backup.
- ☒ **Pricing.** Backup and recovery software must be competitively priced. Competition in this case comes from a perceived mindset that customers are not only using desktop recovery software for backup but also using solutions for system management that focus on the desktop, such as cloning/imaging software, IT asset management software, and software distribution to manage individual desktops.

Software solutions are available to manage end-user backup. However, IT departments have addressed end-user data backup with no formal process, by saving to the network, and by third-party backup and recovery software.

Saving individual files to network drives is not the appropriate solution because this informal system lacks an automatic scheduling capability that regularly backs up user data. Without this feature, few end users are diligent in backing up data on their own without some type of prompt.

One Financial Services Company

Consider Eaton Vance. This mutual fund company traces its beginnings to the early 1920s, and it has grown to offer a line of mutual funds and related financial management products. The company's growth occurred through many bull and bear markets over the years by aggressive sales, cost control, and automation of computer equipment.

Eaton Vance now sports 550 employees, consisting of portfolio managers, equity analysts, and the technical and administrative staff necessary to support and manage the more than \$49 billion the company has under management.

Management Challenges

While many portfolio managers, analysts, and other financial management professional are on the road frequently, the overwhelming majority of the management staff work from the company's Boston headquarters. This means that Eaton Vance's IT staff generally must only deal with the desktop applications and data generated by the staff on a daily basis. Except for a few machines here and there, the company successfully migrated to Windows 2000 on the desktop some months ago.

The company wanted a software solution that required minimal support, but with maximum value. Only two individuals were going to provide direct support for the solution, and that included backup. The company's backup support also comes through the help desk; as calls come in requesting support to recover lost data, that request is addressed by the help desk staff. However, the help desk staff wanted to get out of that business of providing file backup and recovery.

Backup with Connected

The company's IT staff considered using Connected Corporation to provide backup and recovery capabilities for its desktops. With this set of solutions, Eaton Vance expected to lower the cost of its solution as well as have more maintainable solutions. Further, it wanted a solution that allowed employees to recover documents on their own without help desk staff intervention, which would decrease costs on the IT side as well as minimize downtime for the individual employees.

FUTURE OUTLOOK

Basically, the future continues to look good with the company's solution. Eaton Vance is interested in continuing with the software solution, and it has been very happy with it since the installation.

ESSENTIAL GUIDANCE

Actions to Consider

IT Departments

A number of vendors offer backup solutions aimed at the desktop as well as the server. While scripts implemented by the IT department to back up software offer some protection, backup tools require regular operation in order to be effective. This means that software solutions should be automatically backed up on a schedule set by either the IT administrators or the employee whose data is being backed up.

Backup Vendors

- ☒ Ensure that their solutions are competitively priced with other types of software support that focus on the desktop.
- ☒ Integrate the security aspects of PC backup software into marketing materials and ROI calculations as an integrated approach to software protection. This helps take advantage of an existing budget that is available for extra security protection but may not be available for software.
- ☒ Consider integrating the software usage capability to manage both PC backup and software license management. This may lead to the multifeatured component that organizations tend to look for, with the simplicity that they need to quickly install a solution and get up and running for high ROI.
- ☒ Provide capabilities with LDAP-based directory services to manage large, decentralized users (allowing the organization to conveniently manage users' using existing network structures).

LEARN MORE

Related Research

- ☒ *EMC Bolsters Storage Software Offerings with Legato Acquisition* (IDC #29773, July 2003)
- ☒ *Worldwide Backup and Archive Software Forecast, 2003–2007* (IDC #29041, March 2003)

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