



Reliable backups, cloud DR modernize financial firm

JANA Investment Advisers simplified compliance and supported data driven insights for its clients with modern data protection on-premises and in the public cloud.



Financial services

Sydney, Australia

Business needs

JANA Investment Advisers needed modern data protection and cloud disaster recovery to respond to increasing industry regulations, ensure data availability to empower its investment advisers, and support its goals as a data-driven company.

Solutions at a glance

- [Cloud DR](#)
- [IDPA](#)
- [PowerProtect DD Virtual Edition](#)
- [Data Protection Suite](#)
- [VMware](#)

Business results

- Simplified and improved compliance with industry and government regulations
- Enabled cloud DR
- Enabled easy DR testing
- Eliminated the need for a second 'warm standby' data center
- Reduced the backup window

Enabled

cloud DR



Reduced

the back up window



JANA is Australia's leading investment consultant, currently providing services to around 80 institutional clients, including corporate, industry and public sector superannuation funds, as well as charities, insurers, foundations and endowment funds. Advising their clients on the investments of approximately \$500 billion AUD, they are an important player in Australia's pension industry – about three-fifths of Australians' pension outcomes are affected by the advice JANA gives.

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In 2001, the company was bought by the National Bank of Australia, and JANA grew rapidly to 110 people with offices in Sydney and Melbourne. Recently, they completed an MBO and are now majority management owned. In preparation for this move, JANA bought a range of Dell servers and switches that now form the core of their data center. When business and regulatory imperatives required them to modernize how they protected their data, their long-term relationship with Dell Technologies encouraged them to investigate a Dell EMC Data Protection solution.

Transforming to a Data Driven Business

“Investment is driven by data,” says Kevin Pritchard, Head of IT and Business Systems at JANA. “Our research generates a lot of qualitative and quantitative data and this drives the insights we deliver to our clients. Investment is both art and science. And that's where the data comes in. We need to protect that data.”

JANA is working on a major project to become even more data driven, necessitating a remodeling of many of their internal business processes, engaging with best-of-breed cloud native financial service providers and moving to a hybrid on-prem – cloud environment. “It is a massive change that's occurring in the investment industry globally. We take it very, very seriously,” says Pritchard.

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It Only Takes Minutes to Be Attacked

A big part of the need to modernize is the requirement for better data protection in a world of growing cyber threats. As a major investment advisor, JANA is subject to industry and government regulations for data security. “The scrutiny of our architecture, our business resilience, is the number one concern for me,” says Pritchard, “particularly as we’re moving

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into cloud. The protection of our infrastructure and information assets is a first order issue. Vulnerable systems can be attacked in minutes. The reporting regime here is rightly onerous and our clients need us to demonstrate that we run a secure shop. Aside from the regulatory pressure, we just want to do the right thing by our clients and their customers.”

Every year, JANA must do an attestation to the compliance departments of their clients. “They throw in a few curly questions here and there,” says Pritchard, “and we don’t attest to it, unless we can prove it.”

Modernizing with Simplicity – and Cloud Disaster Recovery

“It’s been an interesting ride,” says Pritchard, “to see a company grow so much in stature and complexity. We have a largely outsourced IT model and a smaller internal team that provides oversight and some internal development and that model was being challenged. I was looking for a solution that preserved that model, allowing us to focus our resources on meeting our business needs and client servicing.”

JANA had two physical data center locations, one for production and one for DR. Daily backup activities were for the most part satisfactory, but certain workloads would sometimes not complete successfully and the backup windows were long. Pritchard notes, “One of the problems I had is that the vendor looking after our servers meant we had limited visibility of backup status, made more worrying if we had incidents where replication and backup to our secondary site failed. I was increasingly nervous about that. I wanted visibility and I wanted control. I wanted to own the solution.”

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With the contract for their DR location coming up for renewal, JANA decided to look for alternative ways to achieve business continuity and enhance disaster recovery capability. They had also begun increasing their use of cloud services, in particular AWS, and it seemed logical to explore public cloud as the DR location. “We’ve had a cloud strategy,” says Pritchard, “we just didn’t want to make a sudden jump. We have to manage between on-prem and cloud-based services, particularly around geo-location requirements on where the data resides.”

Their existing backup hardware was aging, and their third-party DR needed to be uplifted. With legal and compliance issues in mind, JANA’s board of directors was asking a lot of questions around backup and DR. “Traditionally I had the two data centers and planned to switch to the warm standby when required. I wanted to increase our protection for an undetected crypto-ransomware type of incident so we had assurance that our DR center was available we really needed it. What I needed was something far more resilient, that would be gapped and quick to restore.” Pritchard decided to give Dell EMC Data Protection solutions a close look.

Owning the Solution, On-Prem and in the Cloud

“We’re really pretty much a Dell shop in desktop and server,” Pritchard explains. “Dell has been very good. Talking with Dell, we learned about the IDPA DP4400. The attractor was the simplicity, and that it would allow me to run DR from the cloud while meeting our RPO and RTO.”

JANA modernized with a Dell EMC IDPA DP4400 24TB appliance, which backs up all their on-premises workloads and replicates to Avamar Virtual Edition and PowerProtect DD Virtual Edition in AWS. It’s a single-vendor solution that protects JANA’s data both on-premises and in the cloud. By eliminating their second

data center, says Pritchard, “I don’t have to replicate equipment. I don’t have to buy additional services. The total dollar spend is pretty good. My CFO is happy.

“The Dell EMC solution is cool because it gives me the benefits of on-prem,” Pritchard says. “It actually gives me greater visibility of what’s happening with the various VMs we’re running. It allows me to target the VMs I want to replicate to the cloud. We need that ability to move workloads around. There’s some data that we’re just not comfortable putting in the cloud.

“VMware is central to us. It has strong tools, it’s virtually an industry standard. We are backing up our VMs and we are rehydrating those VMs in the cloud. It’s a real benefit that Dell EMC data protection is so tightly integrated with VMware. So, on-prem we have a set of our data and in the cloud, another set of our data, plus Cloud DR,” says Pritchard. “Now we can protect everything successfully, and within the backup window. Our key servers are up there in AWS, they’re protected, they’re secured. We have rapid recovery for some of our VMs so that if we did have a DR event, we wouldn’t be out for too long.”

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“The Whole Process is Pretty Easy”

Now JANA can prove compliance with confidence, says Pritchard. “Our clients, driven by the regulatory agencies and their rules about the resilience of third-party suppliers, are asking how reliable are your backups, your BCP and DR? Have you tested them? Well, every day I get a lovely little email with lots of green dots on it. If something fails, I get an email alert. DR testing used to be disruptive, but now that we’ve got this solution in place, it becomes transparent – seamless. I can test the site; I know it works. And I can do that using only our data protection solution from Dell Technologies. The whole process is pretty easy.

“In fact, this solution makes DR so much easier, that I have confidence that any of my staff could go into that console and click the button and within a set amount of time, depending on what need to be restored, have something up and running. If we lost our data center, I could run this business in the cloud.”

Moving Ahead, Feeling the Love

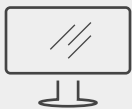
With modern data protection, JANA is moving forward with their project to use data analysis to provide enhanced services to their clients. “We’re collecting and collating exponential amounts of data,” says

Pritchard. “It becomes historical and forms a large data set. We need that data to be available to our clients, because it gives us industry insight. For example, a widespread or global disaster would have impacts across all our clients. Our job will be to help then navigate that, and it’s got to be data driven.

“We’ll probably be an 80 percent cloud-based business in a couple years’ time. We’re integrating more and more with third-party suppliers who are all cloud native and we have to work in a multi-cloud environment. And with Dell, we still feel the love. I tell you, it is so important to have good contact directly into the business. I’m so much happier where we are now than where we were, especially around resilience.”

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