

CASE STUDY



CNA TRUST



Summary

CNA Trust in Costa Mesa, California holds a unique position in the highly competitive retirement planning industry: CNA Trust is one of the nation's leading retirement plan providers and offers a full range of related services, from conversion management and record-keeping to tax reporting and self-directed brokerage services. Success grew out of meticulous customer focus. CNA Trust assures clients the unfailing ability to manage their investments. Customer focus led CNA Trust to turn to NSI® Software for business continuance and disaster recovery solutions.

CNA Trust Assures High Availability with NSI's Double-Take

Time is money and timing is everything. Under those guiding principles, CNA Trust has established an unsurpassed reputation in the retirement industry, providing clients with superior service. When California's CNA Trust undertook the transfer of 750 retirement plans onto its platform, the conversion occurred without any 'blackouts'--not a single moment when plan participants were out of the market. Over 100 employees worked more than 48 hours to carry out the largest transfer ever accomplished with no blackout period. That kind of attention makes CNA Trust the leader in its field. The same kind of attention led CNA Trust to turn to NSI Software and Double-Take® for Disaster Recovery capability.

A top-rated financial institution by Bauer Financial reports and Veribanc, CNA Trust is unique, offering a full range of services from conversion management and record keeping administration to self-directed brokerage. Customers have seamless transaction capability and a single source for all plan needs and inquiries. Even more important, participants can complete transactions or obtain account information twenty-four hours a day, seven days a week.

"Double-Take was the optimum solution that integrated smoothly with our core application. In fact, Double-Take's flexibility made it the only option."

Christina Surmenean, Senior Vice President and CIO for CNA Trust

CNA Trust's unwavering commitment to customers earned the company a distinctive reputation. As a result, the company tripled its Trust assets to over \$3 billion in five years, and increased its client base to 300,000 participants. An escalating client base and increasing assets mean proliferating data: CNA Trust's data more than tripled in a single year.

"CNA Trust's growth and the dynamic nature of financial management demand High Availability," said Christina Surmenean, Senior Vice President and CIO for CNA Trust. "We have to be sure business will continue without interruption and that requires high availability."

CNA Trust's search for a Disaster Recovery/High Availability solution ended with Double-Take.

About NSI Software

Established in 1991, NSI Software, together with its partners, delivers award-winning data replication and high availability solutions and services. NSI Software products, including Double-Take and GeoCluster™, enable companies to recover quickly and easily from disasters, and continue to provide business-critical information for demanding customer environments. NSI Software's patented technologies reduce downtime, protect data and applications, and keep businesses running across geographically dispersed networks. Industry leaders Dell, HP and IBM have selected Double-Take as the replication engine of choice for their NAS and server devices.

Growth Necessitates Change

Initially CNA Trust had relied on tape back-up and restoration—an adequate safety measure if servers were down. With regular annual testing, CNA Trust kept a close watch on its operations. But mounting data and rising demand for access made tape back-up a lengthy complicated process that drew on an increasing number of resources.

By mid 2002, CNA Trust had over 300 gigabytes of data to that would need to be restored in case of an outage. Backing up this amount of data required 3 or 4 tapes shared by as many as twenty servers. With tape, bottlenecks are inevitable; accuracy is not. And there are times the first back-up isn't successful. In short, tape back-up alone no longer met CNA Trust's stringent demands for service.

"The recovery time using tape back-up with 300 gigabytes would be over thirty-six hours," said John Evans, Vice President of Network Operations. "That is completely unacceptable."

NSI's Capacity Planning Service Helps Optimize Disaster Recovery

Throughout CNA Trust's investigation into High Availability solutions, NSI's Double-Take stood out. Criteria included the ability for byte-level replication (rather than file level) and ease of integration with the highly customized core application that is the backbone of the CNA Trust's operations.

NSI's Capacity Planning Service was an essential component in CNA Trust's High Availability implementation. Unique to NSI, Capacity Planning enables customers to determine the rate of data change in their existing environment. By analyzing capacity requirements before rollout, CNA Trust was able to optimize their solution and identify opportunities for improved efficiency.

"With NSI's Capacity Planning, we were able to fully understand our requirements. We could see minute by minute what the data change rate was, where the peak and low periods were. That baseline was vital for accurately sizing our replication data circuits for business continuance."

John Evans, Vice President Network Operations

With Capacity Planning Service, a week of logging produces data change statistics that help balance bandwidth costs and latency –the gap in timing on the target side of the replication process. When a longer latency period is acceptable, savings in bandwidth are possible.

For CNA Trust, High Availability was essential for superior customer service focus. With NSI's Capacity Planning, CNA Trust was able to:

- simulate the company environment;
- demonstrate network bandwidth requirements;
- clarify environmental dependencies;
- review infrastructure requirements;
- assess issues related to using the replication environment in production;
- plan a tailored disaster recovery solution.

High Availability, Disaster Recovery Capability, Easy Integration

With a clear understanding of its environment, database allocations, and hardware configurations, CNA Trust prioritized service levels, applications, and services. Of its numerous production servers, the company identified twenty-five primary servers representing critical applications, and established twenty-one target servers for replication.

“We recovered all critical systems, including core systems and Web presence, in only four hours, compared to the thirty-six hours that tape backup would have required.”

John Evans, CNA Trust

CNA Trust’s thorough preparation and planning smoothed the implementation process, and the company estimated a 6 – 8 hour recovery time. When the Double-Take solution was rolled out, recovery surpassed all expectations and took only four hours.

The Benefits of High Availability: Cost Savings and Customer Retention

With Double-Take, CNA Trust can resume full business operations in about one tenth the time that would be required by tape back up alone—a time savings of over thirty hours. Industry estimates of downtime costs vary from \$20,000 to \$80,000 an hour. Even with conservative calculations, the value of time saved could exceed half a million dollars.

While it’s difficult to quantify the value of business per hour, it is not difficult to calculate what satisfied customers are worth. The sense of confidence that CNA Trust gives its clients is the basis for the company’s growth and success.

“Potential customers always ask about our plans to sustain operations through a disaster,” said Ms. Surmeanan. “The information is part of every RFP we develop. If we couldn’t satisfy their requirements, clients would take their business elsewhere.”

CNA Trust developed its Disaster Recovery/High Availability solution with the extraordinary care that has become the company’s hallmark, from extensive testing to selection of a nearby target site for its Double-Take implementation. Current target servers are in Los Angeles, a safe distance from the primary servers, but near enough to assure expertise is close at hand.

The company is replicating 60 gigabytes every 36 hours over a limited size circuit. In the future, CNA Trust will increase the number of file servers and Exchange servers in its Disaster Recovery solution. When they do, Double-Take will be there to help CNA Trust keep pace with growth and changes, protecting data, assuring availability, on time, on budget.

Double-Take is a reliable, stable, part of our platform that has performed beyond what we had hoped NSI service and expertise have been exemplary, and their claims have been borne out by Double-Take’s performance.” John Evans, CNA Trust

For more information on NSI Software’s products, please contact NSI.

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