



NetApp®

## Success Story

# Navellier Slashes IT Costs Using Quest's Cloud Services Delivered on NetApp



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### KEY HIGHLIGHTS

#### Industry

Financial services

#### The Challenge

Transform costly IT infrastructure into a streamlined virtual environment while improving disaster recovery practices.

#### The Solution

Leverage Quest's cloud-based disaster recovery and on-site desktop virtualization services delivered on flexible, efficient NetApp® storage.

#### Benefits

- Eliminated 26 of 28 physical servers by virtualizing
- Helped reduce IT costs by 35% through desktop virtualization deployed as a private cloud
- Reduced risk by replicating business-critical data to dedicated, cloud-based NetApp storage
- Improved productivity and end-user experiences through enhanced performance

### Customer Profile

Financial services company Navellier & Associates manages more than \$2.5 billion in private accounts and no-load mutual funds for over 5,000 global clients that include individual investors and institutions. The company guides investors by applying its disciplined, quantitative investment process to a broad range of equity products. Founded in 1980 and headquartered in Reno, Nevada, Navellier & Associates is staffed by 38 full-time employees.

### The Challenge

#### Outsmarting a volatile market

As a premier provider of individual and institutional asset management, Navellier & Associates supports its clients in generating returns on their financial investments. In a volatile industry in which financial services organizations face intense pressure to reduce costs, companies such as Navellier & Associates are placing renewed focus on maximizing the returns on their capital and operating investments.

The company looked to its IT environment for opportunities to reduce costs. "We began developing an approach for

redesigning areas of our environment including our servers, storage, desktops, and overall business continuity strategy. However, the market had other plans for us," says Bob Fuller, IT manager at Navellier & Associates. The market downturn called for the company to investigate more aggressive ways to cut costs. "Every area of our organization that we could possibly reduce costs in demanded a strategy for getting us there," he says.

The company decided to move forward with a plan to virtualize much of its infrastructure to a private cloud environment to reduce hardware and IT management costs. In addition, a centrally managed virtual infrastructure would provide a manageable business continuity plan that met stringent financial services regulatory requirements. "Business continuity is imperative to our customer service and success," says Fuller. "Most important, our associates need uninterrupted access to our Axys® portfolio management system, which is critical to day-to-day decision support."

“NetApp performance is the main reason our end users are having such a positive virtual desktop experience and working more productively. In addition, we’re spending 33% less on power, cooling, and IT administration.”

**Bob Fuller**

IT Manager, Navellier & Associates

After further investigation into cost reduction, Navellier elected to move key portions of its infrastructure and IT management to cloud service provider Quest. The technology management company, headquartered in Sacramento, California, offers private, public, and hybrid cloud solutions, along with managed services, to customers of all sizes. Navellier adopted the Quest Desktop Virtualization and Business Continuity and Disaster Recovery services to better protect its applications and data and reduce costs.

To support its diverse portfolio of enterprise-class cloud and managed services customers, Quest depends on NetApp storage. Quest’s customers including Navellier benefit from the flexible, efficient NetApp storage that offers integrated data protection, centralized management, secure multi-tenancy, and virtualization enablement. “The NetApp solutions offer a flexible and efficient shared IT infrastructure that streamlines delivery of our cloud services,” says Tim Burke, president and CEO at Quest. The company provides its Unified Virtual Data Center, Desktop Virtualization, Virtual Application Development, Business Continuity, and Disaster Recovery services on NetApp storage.

### **The Solution**

#### **Streamlining IT with innovative cloud services**

Quest deployed a NetApp FAS2020 storage system at Navellier’s headquarters for delivering its Desktop Virtualization service through a cloud-based VMware® virtual desktop environment. The system is replicated nightly to a dedicated NetApp FAS3170 storage environment at Quest’s Sacramento disaster recovery site.

To deliver its private cloud Business Continuity and Disaster Recovery service to Navellier, Quest employs NetApp integrated data protection. Quest leverages NetApp SnapMirror® to replicate Navellier’s financial and operational data off site. Quest also depends on NetApp Snapshot® technology, SnapVault®, SnapRestore®, and SnapDrive® for advanced backup and recovery of Navellier’s critical investment applications.

Overall business continuity has improved for Navellier since leveraging NetApp in its cloud-based disaster recovery practice. “We depend on Quest and NetApp storage to help protect invaluable customer data for the corporations, endowments, foundations, and other organizations we serve,” says Fuller. The disaster recovery solution also helps Navellier maintain compliance with Securities and

Exchange Commission and other requirements. Quest employs advanced industry-standard methodologies to help customers such as Navellier meet line-item security and compliance requirements.

The efficiency of NetApp storage enables Quest to optimize its storage utilization and reduce operating and infrastructure costs for its business and for Navellier. Quest’s storage administrators use NetApp deduplication to help control data proliferation and reduce storage requirements. Quest achieves anywhere from 25% to 30% in capacity savings on its NetApp storage devices and those residing at customer sites. The company further reduces storage costs and improves performance through resizing volumes dynamically using NetApp FlexVol® technology and cloning test and development environments using NetApp FlexClone® technology.

The manageability and flexibility of NetApp storage translates to cost savings for Quest and customers such as Navellier. “We can move quickly to deploy cloud solutions for our customers,” says Burke. Flexible features such as unified support for Fibre Channel and FCoE enable Quest to centralize management and protect investments, with the ability to adapt its cloud architecture as business requirements



change. “NetApp FCoE offers us multiple options for SAN connectivity and networking, while the 10Gb Ethernet gives us the bandwidth needed to deliver our customers’ most demanding applications,” notes Burke.

#### **Business Benefits**

##### **Affordable, reliable disaster recovery**

Navellier & Associates understands how to help its 5,000 clients manage the risks of their financial portfolios. The company has made strides in reducing its own risk by enhancing its disaster recovery strategy through Quest’s cost-effective, reliable, cloud-based Business Continuity and Disaster Recovery service delivered on NetApp storage.

Quest and Navellier worked together to identify the best approach to meeting Navellier’s pressing disaster recovery needs. Through Quest’s DR for the Day™ program, Quest led Navellier through a disaster scenario that involved massive flooding, and then reviewed its disaster recovery plan on site to test the company’s readiness. Navellier opted for replicating its business-critical applications and data to dedicated NetApp storage at Quest’s Sacramento disaster recovery site.

To deliver its private, public, and hybrid cloud disaster recovery services, Quest relies on the flexibility, scalability, and

integrated data protection capabilities of NetApp storage. NetApp also supports Quest in helping its customers protect their assets cost effectively. “Disaster recovery and high availability are expensive propositions for companies such as Navellier,” says Burke. “NetApp SnapMirror and Snapshot technologies allow us to provide data storage, replication, and restoration that cost 60% to 70% less than most alternatives. We can pass along those savings to customers like Navellier.”

Fuller stresses the importance of the high availability enabled by Quest and NetApp data protection, efficiency, and virtualization. “If something happens in the investment market and clients make urgent requests to buy and sell assets, our associates need to be able to count on the availability of our CRM tool and the inherent client data,” says Fuller.

##### **Virtualization synergies that deliver**

Navellier depends on Quest’s Desktop Virtualization service to significantly reduce costs and simplify IT management. Quest deployed a NetApp FAS2020 storage system on site for delivering the Navellier VMware virtual desktop environment through an on-site private cloud. Navellier delivers all-business-critical applications, such as Axys portfolio management software, through desktop virtualization on NetApp

storage. The company eliminated 26 of 28 physical servers by virtualizing on NetApp.

Since running its on-site and remote virtual desktops on NetApp storage, Navellier applications are running faster and smoother. “NetApp performance is the main reason our end users are having such a positive virtual desktop experience and working more productively,” says Fuller. “In addition, we’re spending 33% less on power, cooling, and IT administration.”

“NetApp integration with VMware and Citrix creates exceptional synergies that provide end-to-end security and isolation in our virtualized environments,” says Burke. NetApp helps cloud customers such as Navellier reduce infrastructure and administration costs, boost application performance, and simplify IT. Quest’s Desktop Virtualization service, for example, reduces desktop hardware acquisition, management, and operating costs by as much as 50%.

##### **Partnering to deliver enterprise-class cloud services**

Today, Navellier depends on Quest and NetApp to optimize IT to improve its investment operations and competitive advantage. Quest in turn depends on its alliance with NetApp to remain competitive in the cloud services marketplace, generating 40% growth in its

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**Tim Burke**  
President and CEO, Quest

managed services in the past three years. NetApp has also supported Navellier growth. “We’ve scaled up our NetApp storage twice so far and it’s been an easy process, with no downtime and no data loss,” says Fuller.

A participant in the NetApp Partner Program for Service Providers, Quest collaborates with NetApp to build, deploy, and deliver innovative cloud service offerings for customers such as Navellier. “Our partnership with NetApp has helped us to deliver competitive, cost-effective cloud services on a NetApp shared storage infrastructure, resulting in significant cost savings for our customers—up to 70% less than most alternatives,” says Burke.

#### SOLUTION COMPONENTS

##### NetApp Products

NetApp FAS2000 series storage systems

NetApp FAS3000 series storage systems

Data ONTAP® 7.3

SnapDrive

SnapMirror

SnapRestore

SnapVault

FlexClone

FlexVol

Snapshot

Deduplication

##### Protocols

iSCSI

##### Third-Party Products

Microsoft® Exchange Server

VMware vSphere™

VMware vCenter™

VMware View

Juniper Networks EX4200 switches

HP ProLiant servers

##### Environment

Applications: Axys Portfolio Management

Server platform: HP ProLiant

Database: SQL Server®

##### NetApp Partner

Quest

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