

Cooke & Bieler



“Through our strategic partnership with Iron Mountain, we’ve been able to successfully execute on our vision for business continuity.”

– Asha Joshi, Information Technology Manager at Cooke & Bieler

CLIENT: Cooke & Bieler
BUSINESS: Investment Company
CHALLENGE: Proactively Address Business Continuity with Limited Resources

For more than 50 years, Cooke & Bieler has delivered on its promise of "high quality, low risk" investing and organizational excellence.

THE CHALLENGE: SMALL COMPANY STRUGGLES TO PROACTIVELY ADDRESS BUSINESS CONTINUITY WITH LIMITED RESOURCES

Cooke & Bieler sharpened its focus on business continuity following the 9/11 tragedies. With business uptime and data protection requirements growing stricter across all industries, the investment management firm boosted its efforts to seek out a business continuity solution that would assure the firm’s compliance with higher accountability standards and protect critical data and information in the event of a disaster.

Amid mounting social and regulatory pressures, Cooke & Bieler questioned the reliability of its existing tape backup strategy. The company doubted the secure storage of its data and email records and struggled with its inability to quickly and cost-effectively retrieve information to satisfy staff members’ data recovery requests.

According to Asha Joshi, Information Technology manager, storing data to tapes onsite was not only ineffective but time consuming. As the only full-time IT professional at Cooke & Bieler, Joshi was responsible for supporting the needs of Cooke & Bieler’s 30-35 staff members across two offices. In addition, Joshi was responsible for all data recovery requests, which required hours of manually searching through tape records by date and time, a method that had limited success. As it

became increasingly difficult to monitor backups due to growth in the firm, Joshi had no way of knowing exactly when data was successfully saved off Cooke & Bieler’s many servers.

As with many small businesses, Cooke & Bieler had limited IT resources available to proactively implement and manage a business continuity solution. Gaining the ability to address security and accountability initiatives without adding to the burden on its internal resources seemed idealistic.

Cooke & Bieler, however, was unwilling to risk a mishap. After researching the services of several vendors, the company partnered with Iron Mountain to launch a three-pronged business continuity plan that would assure the secure management and offsite storage of information through comprehensive and automated services offered only by the global leader.

THE SOLUTION: 24/7/365 BACKUPS AND COMPREHENSIVE EMAIL MANAGEMENT AND SECURE EMAIL ARCHIVING

To start, Cooke & Bieler selected Iron Mountain’s LiveVault server backup and recovery solution based on the solution’s ability to automatically and continuously back up server data via a secure Internet connection. After considering several network attached servers, Cooke & Bieler realized they would require extensive maintenance time, which the company just did not have. LiveVault not only assured Cooke & Bieler that its data would be safely stored in a secure, remote location, but also provided Joshi with immediate access to the recovered records at staff members’ requests. With Iron Mountain’s Web-based

CASE STUDY

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records management system, Iron Mountain's Connect,[™] Joshi would have instant visibility and retrieval access to records. Additionally, the portal would provide Joshi with a comprehensive series of reports documenting the secure transfer of data from all of Cooke & Bieler's servers to the vault.

Iron Mountain's LiveVault server backup and recovery solution offered Cooke & Bieler continuous backup of all critical files, ensuring the company's combined eight servers (including the file, SQL and portfolio-management servers) would be protected and up-to-date at all times. Each server contains invaluable files, and a loss of any could prove detrimental to the business.

In a matter of weeks, Cooke & Bieler successfully implemented LiveVault. According to Joshi, "The dedicated Iron Mountain team worked closely with me throughout the process to provide the level of support that I needed, resulting in a seamless implementation of the service. We can confidently say our backup services are equipped to get the company up and running again quickly in the event of a breach, and as such, Iron Mountain has established itself as our corporate standard."

With Iron Mountain's expert staff continuously monitoring server backups, Cooke & Bieler is confident that data is secure 24 hours a day, 7 days a week, and 365 days a year. If a backup fails, Iron Mountain alerts Joshi immediately and helps Cooke & Bieler troubleshoot any issues, preventing potential breaks in business continuity before they start, even outside of business hours. With Iron Mountain's secure Web interface Joshi can access Cooke & Bieler's data, controlling data backup and restoration from the office or from the comfort of her home.

"For our staff members, being able to access the data they need when they need it drives their success," says Asha Joshi. "Before we implemented Iron Mountain's solution, searching for lost data was a long and arduous process. If a staff member accidentally deleted a document a vendor had sent over, it was rather time consuming to retrieve it. Now, all I need to do is log onto my Web browser and I can locate the file in just minutes."

THE RESULTS: MANAGED RISK WITHOUT THE BURDEN ON RESOURCES

Cooke & Bieler's more recent adoption of Iron Mountain's hosted Email Continuity and Email Archiving services is a strong testament to management's satisfaction with the LiveVault solution. Together, the services ensure that Cooke & Bieler's business operations will continue running smoothly despite unexpected disruptions.

In the event of a disaster or even occasional power outages, Iron Mountain's Email Continuity service provides continuity of Cooke & Bieler's email service, with instant access to email company-wide. The service ensures that Cooke & Bieler's staff members will have access to their email anytime and anywhere using a simple web browser. Furthermore, the solution radically decreases costs and implementation time for the small company.

With Iron Mountain's Email Archiving service, Cooke & Bieler has minimized storage loads and network congestion. Through adherence to retention and destruction policies – and by more-efficient indexing and searching of archived emails – Email Archiving enables Cooke & Bieler to cost-effectively save and retrieve important email records. With this service, Cooke & Bieler has established a legally credible email management program that will keep the company in compliance with new SEC regulations.

"Cooke & Bieler's partnership with Iron Mountain has given us the confidence that we are protected in the event of a disaster and in full compliance with government regulations," said Joshi. "With its national footprint and extensive service offerings, Iron Mountain has proven its ability to support our growing and changing data protection needs."

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