

CUSTOMER SUCCESS STORY:
ORCHARD FUNDS
MANAGEMENT

Orchard safeguards AU\$3.5 billion of investment with improved recovery management.



Customer Profile

Industry: Financial Services
Company: Orchard Funds
Management
Employees: 150
Revenue: AU\$77 million

Business Impact Summary

Business:

Orchard Funds Management is a leading property funds management company based in Australia. The firm invests in a range of commercial properties and is responsible for managing more than AU\$3.5 billion worth of investments.

Challenge:

To ensure the continuity and profitability of its investment services, Orchard and its staff need reliable access to a range of systems and corporate data. The company recognised the importance of a strong disaster recovery strategy in order to deliver a high level of service to its clients and minimise business risk.

Solution:

Orchard developed a new disaster recovery strategy, which included the implementation of a CA Recovery Management solution. This enables the company to continuously replicate data from its core systems to ensure that they can be quickly restored in the event of a major IT failure or incident.

Result:

Orchard can now restore its primary systems in a matter of hours, which has helped to dramatically reduce the risk of business downtime and user disruption. This in turn has enabled the company to boost profitability, enhance compliance and safeguard the quality of client services.

Business

Investing in the future

Orchard is one of Australia's leading property funds management companies. Headquartered in Melbourne, the firm also has a number of regional offices throughout the country.

With more than AU\$3.5 billion of funds under management, the company invests in commercial property — including retail, office and industrial space — as well as less traditional property assets, such as childcare centres and medical facilities.

The company's objective is to deliver investment solutions that offer attractive returns, tax effectiveness, portfolio stabilisation and capital growth to investors. To achieve this, Orchard Funds Management maintain a strong commitment to performance, product innovation and a personal approach.

In addition to building the Orchard brand in Australia, the firm is currently focusing on establishing a business in Europe, which it believes will be as profitable as its Australian counterpart within five years.

Challenge

Ensuring a cost-effective and scalable platform for growth

To support its plans for growth, Orchard must have a scalable, highly available and cost-effective IT infrastructure. The company's 150-strong team needs continuous access to property management and accounts systems to make and track investments on behalf of clients.

Dan Wimpres, IS Infrastructure Manager for Orchard, comments, "IT supports every area of the business, and is key to the day-to-day activities of our property managers and revenue generation."

In 2007 the company embarked on a massive datacentre consolidation project with the aim of reducing capital expenditure and improving business agility. The project involves virtualising the company's server platform using VMware technology; so far this approach has enabled Orchard to reduce its physical production server estate by 35% whilst minimizing the footprint of their DR hotsite to just four physical servers.

Preventing costly business downtime

As part of this infrastructure optimisation programme, Orchard assessed all aspects of its IT, and identified business continuity — and specifically data availability — as a major risk.

With the cost of downtime to the business extremely high through both lost investment opportunities and staff productivity, Orchard realised it needed to develop a more effective disaster recovery strategy.

"In the event of a major incident, we would have to source new hardware, rebuild each system and then import the data from backup tapes," comments Wimpres. "We estimated that it would take us up to a month to restore all our systems and data — at great cost to the business."

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One of the first applications that Orchard would need to restore is email — especially as half of its employees have Blackberry devices and often access messages remotely. “We rely on our email environment to communicate with property managers in the field and with our clients,” adds Wimpress.

In addition to meeting internal expectations for IT availability, Orchard must also ensure compliance with industry regulations, such as those governed by the Australian Prudential Regulation Authority.

Solution

Replicating core systems

To enhance its business continuity capabilities, Orchard decided to investigate data replication technologies as part of a company-wide disaster recovery initiative.

Following extensive research, the firm opted to deploy a Recovery Management solution from CA. “The product suite for CA XOssoft™ Replication exactly matched our requirements,” comments Wimpress. “It offered solutions specially designed to work with Microsoft Exchange, Microsoft SQL server, file servers and BlackBerry Enterprise Server.”

Orchard uses CA XOssoft Replication to continuously replicate its core application data between dual datacentres in Melbourne. “CA XOssoft Replication was easy to install and integrated seamlessly with our virtualised environment,” comments Wimpress. “We were also impressed with the solution’s BlackBerry integration and functionality. Our senior staff require high levels of email access and availability, so the ability to safeguard mobile messaging data is a significant advantage.”

With email access so critical to the business, Orchard utilises XOssoft Replication’s Assured Recovery module on its Exchange server cluster to automatically test the replication process on a daily basis. Combined with occasional manual data integrity testing, this provides Orchard with total confidence in the availability of its business-critical data.

“Once installed, CA XOssoft Replication requires minimal manual intervention,” comments Wimpress. “It just runs in the background and provides us with total peace of mind.”

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Orchard Funds Management

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Result

Minimised business risk

Orchard’s IT department can now recover from a disaster with minimal disruption to business. As Wimpress explains, “Our service level agreement stipulates a recovery time of four hours for our primary systems, but depending on the severity of the incident we could be up and running again within the hour. In the event of a hardware failure, the recovery time is just a matter of minutes.”

The company’s improved recovery management capabilities have reduced business and user downtime. This in turn has:

- Improved the availability of information services
- Increased agility and productivity
- Safeguarded the quality of client services and their investments

“The CA Recovery Management solution ensures that we can offer the level of systems availability required in the fast-paced property funds management business,” comments Wimpress.

The CA solution has also played a key role in enhancing Orchard’s compliance efforts and its ability to manage future business growth. As Wimpress confirms, “CA XOsoft Replication and our new disaster recovery strategy have not only helped to enhance our level of compliance with industry regulations and standards but have also prompted a significant culture shift. Business continuity is now top of the agenda, which will prove key as we look to expand the company’s operations.”

To learn more and see how CA software solutions enable other organizations to unify and simplify IT management for better business results, visit ca.com/customers.