



# Storage Solutions for Financial Services from Intel® ESAA

## Case Study Intel® Enabled Server Acceleration Alliance



CRU Solutions, based in Cleveland, Ohio, provides managed service solutions for business, government, and non-profit organizations nationwide.

<b>Challenge</b>	Chapman & Chapman, a midsized family-owned financial and insurance firm, needed a new storage solution that maximized employee efficiencies and reduced the total cost of ownership.
<b>Solution</b>	CRU Solutions used recipe configuration guides available from the Intel® Enabled Server Acceleration Alliance (Intel® ESAA) to develop backup and endpoint security solutions. Thanks to CRU Solutions and Intel ESAA, Chapman & Chapman has a reliable, efficient, and growth-oriented storage infrastructure to meet their needs now – and in the future.
<b>Intel® ESAA Recipes Used</b>	<ul style="list-style-type: none"> <li>▪ Symantec Endpoint Protection 11.0 on Microsoft* Windows* – Intel® Modular Server</li> <li>▪ Symantec Backup Exec* on Microsoft* Windows* – Intel® Modular Server</li> </ul>

### Summary

In a challenging economic climate, meeting the needs of customers in the financial services sector includes providing verified solutions with a low total cost of ownership. This case study explores how Intel reseller CRU Solutions utilized the Intel® Modular Server platform and the Intel® Enabled Server Acceleration Alliance (Intel® ESAA) program to rapidly develop a leading-edge Intel®-based server solution for Chapman & Chapman in a cost-effective manner.



## The Challenge

### Getting the Right Technology for Financial Services Today

Chapman & Chapman, founded in 1886, is a family business that provides insurance and financial services to corporate and individual clients. "For the past 20 years, Chapman & Chapman has partnered with CRU Solutions to find the best business tools that will enhance productivity," explains Jim Kerr, President of CRU Solutions. In recent years, Chapman & Chapman's business has grown substantially. Their legacy storage solution was comprised of a four-year old server that functioned as the file, back up, antiviral and fax server, and a newer Microsoft\* Exchange\* server. While the older server was running multiple business applications, it was also beginning to show signs of failure. Additionally, Chapman & Chapman's customer support system required remote access to ensure fast response time outside of standard office hours. This high intensity client service model was a critical part of Chapman & Chapman's business plan to attract new clients and distinguish their company from the competition.

### Turning to a Trusted Advisor for Help

The storage system at Chapman & Chapman needed to be refreshed, and the trusted advisor relationship CRU Solutions had earned with Chapman & Chapman allowed them visibility into their operations to rapidly access opportunities for improvement. "Our goal was to provide a platform that offers both scalability and continuity at a price point a small business can afford," says Kerr. In today's economic climate and globally competitive environment, CRU Solutions has a sharp focus on providing the right solutions in a timely manner. CRU Solutions creates custom tailored platforms for all their clients by assessing their business needs. "Keeping our employees up to speed with the most recent technology allows us to provide the best solutions for our clients," explains Kerr.

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CRU Solutions joined Intel ESAA in the beginning of 2008 to enhance the resources available for their sales force and more effectively formulate proven solutions for their clients. Kerr explains that the Intel ESAA program allows CRU to easily pinpoint compatible hardware and software, so that they can respond to client needs more rapidly and persuasively and remove the trial-and-error process from managed services deployments. "Small businesses can't afford to make technology mistakes, particularly in today's economy, so the solution needs to be right the first time," notes Kerr.

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### A Comprehensive Solution for Chapman & Chapman

CRU Solutions proactively monitors their deployed managed service solutions, and knew that Chapman & Chapman was due to refresh their file server. Meanwhile, CRU Solutions was looking ahead at Chapman & Chapman's expanding business and the challenges posed by their aging Exchange server. Chapman & Chapman's remote computing needs and the potential for another branch office meant that CRU needed to find a comprehensive answer to their technology challenge. Kerr turned to the solution configuration guides (or "recipes") provided by Intel® ESAA for the answer. "There is no substitute for ease of use provided by the [Intel] ESAA program," says Kerr.

## The Solution

### Intel ESAA Guides Certification and Compatibility

CRU Solutions decided to migrate Chapman & Chapman to the Intel Modular Server platform, which provided the option of splitting multiple applications onto separate compute modules. CRU focused on lowering total cost of ownership while maximizing uptime to meet the demands of the financial services industry. Kerr notes that a traditional rack mount server failed to account for the upcoming migration of their client's Exchange server. "By anticipating future needs, we were able to provide a solution that allows Chapman & Chapman to come out ahead."

Kerr relied upon Intel® ESAA recipes to guide his search for the best solution. "The recipes we used allowed us to quickly determine that the hardware deployment was compatible with the Symantec software we were interested in using. All we had to do was log on to the ESAA website and pull the recipes," described Kerr.

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*— Jim Kerr, President, CRU Solutions*

Kerr notes that his team was able to find a solution that was certified and tested and propose it to Chapman & Chapman in less than a month – drastically decreasing CRU's time to market.

## Chapman & Chapman's Intel® Modular Server Solution

Winner of TechWorld's 2008 Server Product of the year, the Intel Modular Server platform provided seamless installation, migration, and growth capabilities. CRU Solutions configured the platform with an Intel® Modular Chassis with integrated 2.5" shared HDD bay, Ethernet I/O Expansion Mezzanine Card, and Compute Module with Intel® Xeon DP Quad-Core Processors. Kerr deduced that this solution allowed Chapman & Chapman a cost-effective option for future expansion because they could purchase new compute modules for the Modular Server system at one-third the cost of a traditional rack or pedestal server. The remote management capabilities of the Intel Modular Server also made it more cost-effective for CRU Solutions to provide a managed service solution for their client.

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*– Walter K. Chapman, President, Chapman & Chapman*

Chapman & Chapman benefited from having a technology tailored specifically for the small to medium sized business to give them a competitive edge in the insurance and financial services sector. "CRU Solutions provided us with a leading-edge modular server that has enabled our service teams to provide the robust support unmatched by our competition. Our clients are then able to manage more comprehensive and sophisticated projects," explains Walter K. Chapman, President of Chapman & Chapman.

### Completing the Deployment

Once they selected a hardware platform, CRU needed a backup device solution to complete the deployment. Kerr found that the Symantec Backup Exec recipe from Intel ESAA offered the necessary processor and memory configurations and detailed the hardware and backup drives that were supported and compatible as external SAS plug-ins for the modular server. Since the recipe configuration included testing of the tape drive, CRU Solutions was able to enhance their operational efficiency by freeing up their employees to address other business needs.

Because the Intel ESAA website was so easy to navigate, Kerr also found a Symantec Endpoint Protection recipe that addressed the data integrity issues his client had expressed. In the financial services industry, data security and integrity are primary considerations. This endpoint solution meant that client service representatives working remotely would always have the guaranteed safety of not only their data, but the data entrusted to them by their customers.

## The Intel ESAA Advantage

By utilizing a pre-tested and validated software and hardware solution from Intel ESAA, Kerr and his team were able to rapidly deploy a server solution and pass along critical cost savings to their client in the insurance and financial services industry. For CRU Solutions, the Intel ESAA program reduced the challenges of certification and testing associated with development of custom-tailored configurations – and helped them get to market faster.

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*– Jim Kerr, President, CRU Solutions*

"With the Modular Server platform, we were able to give Chapman & Chapman the least expensive way to grow their business," noted Kerr. "The benefits of the recipes were huge. Any of the compatibility elements that would be addressed for the hardware and software solution require a significant investment for our business. This recipe not only cut down on our investment, but it meant that in an hour's time on the Intel ESAA website, I could take a product to market that I could not have otherwise," explains Kerr.

Using resources exclusively available to Intel resellers through the Intel ESAA program, CRU Solutions met the critical business needs of Chapman & Chapman in a time frame that would not have been otherwise possible. This efficient and effective deployment provides a model for CRU to win business and continue to build trust with their clients in the future.

### About Intel ESAA

The Intel Enabled Server Acceleration Alliance is a collaboration between Intel and independent software and hardware vendor members that enables resellers to deliver pre-tested, high-quality solutions based on Intel® Server and Workstation boards and systems. Membership in the program is a free benefit for Intel® Channel Partner Program members at the Premier and Associate levels.<sup>1</sup> To learn more, visit [www.intel.com/go/esaa](http://www.intel.com/go/esaa).

### About CRU Solutions

CRU Solutions, based out of Cleveland, Ohio, was founded in 1982 by President Jim Kerr. The company provides managed service solutions for business, governmental, and non-profit organizations nationwide. CRU Solutions has dedicated itself to supporting leading edge technology solutions to enable their clients with improved productivity, security, and continuity of operations. To learn more, visit [www.crusolutions.com](http://www.crusolutions.com).

For more information on the Intel ESAA program, visit [www.intel.com/go/esaa](http://www.intel.com/go/esaa)  
For more information on the Intel Modular Server platform, visit [www.intel.com/go/mft](http://www.intel.com/go/mft)

<sup>1</sup>For more information on how to become a member of the Intel® Channel Partner Program, visit [www.intel.com/cd/channel/reseller/emea/eng/membership/index.htm](http://www.intel.com/cd/channel/reseller/emea/eng/membership/index.htm).

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