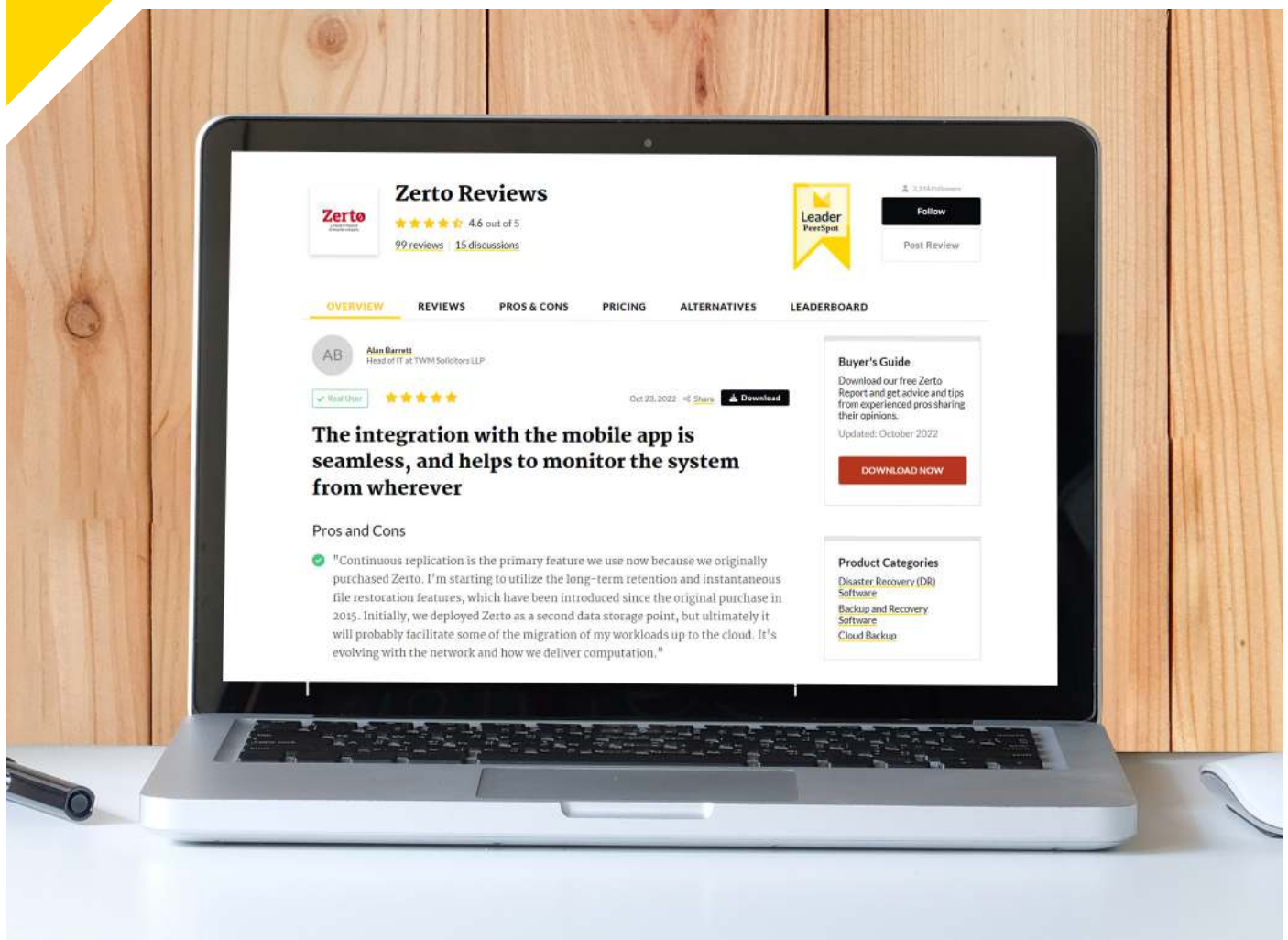


PeerPaper™ Report 2022

Based on Real User Reviews of Zerto

Modernizing Data Protection in a Hybrid World for Financial Services



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Introduction

Financial services firms need to balance strict security and compliance requirements with mandates for digital transformation and customer expectations for an “always on” business. Data protection, in particular, can be challenging for a financial institution that’s migrating to a hybrid cloud architecture. In this paper, users of the Zerto solution in financial services share how they are modernizing their data protection processes and countermeasures. They discuss how Zerto enables them to address the threat of ransomware, improve disaster recovery, and accelerate cloud migration. As they explain in reviews on PeerSpot, Zerto makes it possible to modernize data protection and stay secure and compliant during changing times

Data Protection Use Cases in Financial Services

PeerSpot members in the financial services industry work across a variety of data protection use cases. For example, a Chief Information Officer at SmartBank, a financial services firm with over 200 employees, uses Zerto to protect all the company's on-premise virtual workloads. These include mission-critical applications, line of business applications, and several unstructured data repositories for disaster recovery.

An Enterprise Infrastructure Architect at a financial services firm with over 200 employees puts Zerto to work in real-time data protection. He has gained the ability to recover within seconds at a point in time. His company deploys Zerto on-premises and multi-cloud on Azure and AWS.

Hot site configuration is the use case for a Vice President of Information Technology at a small financial services firm. The firm runs two data centers, one corporate, the other co-located. They use Zerto to replicate servers and virtual machines (VMs) between those two sites. A Manager/System Administrator at a small financial services firm also does replication with Zerto. In his case, replication occurs between data centers in New Jersey and Ohio. He said, "I'm using a Zerto instance for my servers and another for my VDI [Virtual Desktop Infrastructure] machines. I can replicate everything." This setup is depicted in Figure 1.



Serge K.
Manager System Administrators
at a financial services firm with
51-200 employees



"I'm using a Zerto instance for my servers and another for my VDI [Virtual Desktop Infrastructure] machines. I can replicate everything."

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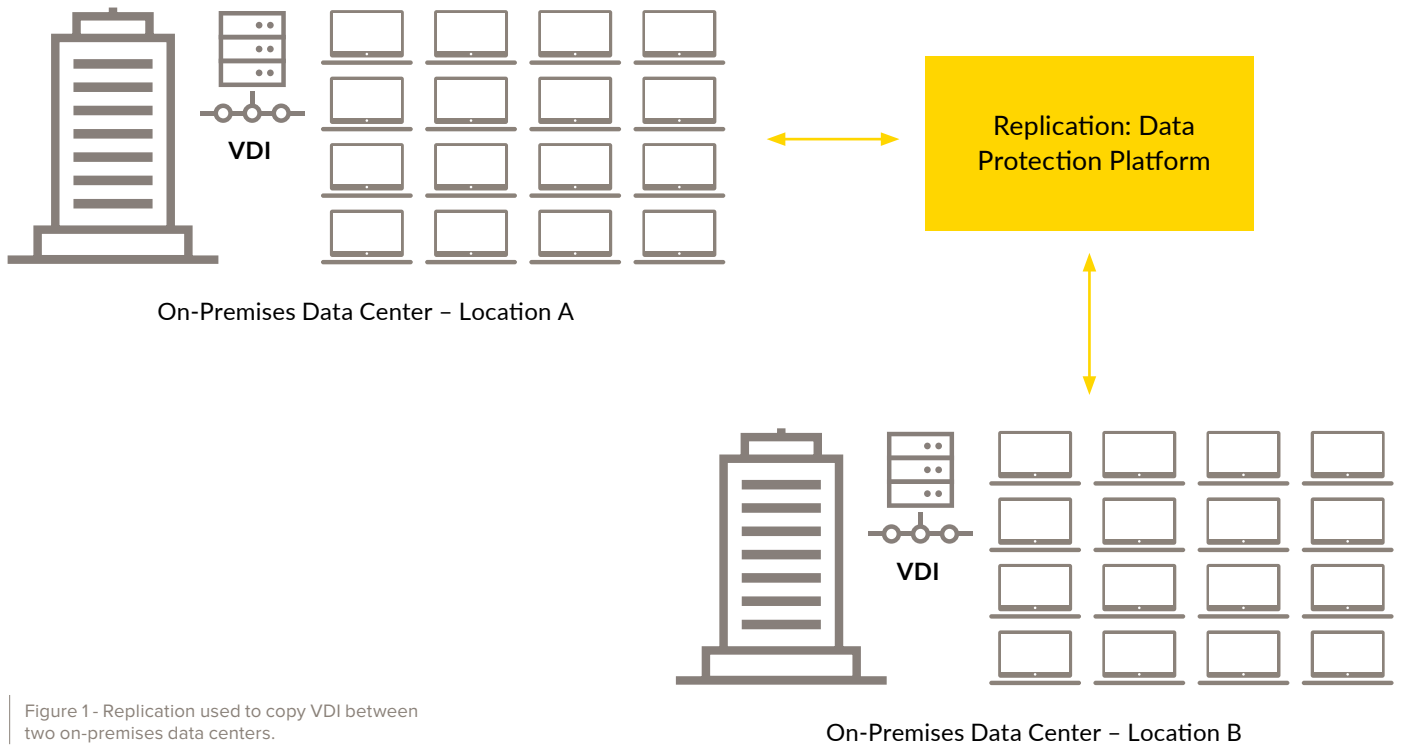
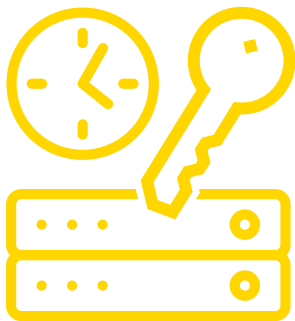


Figure 1 - Replication used to copy VDI between two on-premises data centers.



Real-time Data Protection

Disaster recovery (DR) is the use case for a Sr. System Administrator at a financial services firm with more than 500 employees. They deploy Zerto on-premises at two DR locations. A Senior System Admin at a financial services firm with more than 500 employees also uses Zerto for DR, which includes quarterly and annual DR tests. SmartBank, a financial services firm with over 200 employees, relies on Zerto as its sole disaster recovery solution.

Defending Against Ransomware

Ransomware mitigation is one of the highest priority data protection tasks in the financial services field. In this context, Zerto users are using the solution for ransomware defense. The Manager/System Administrator runs Zerto as his firm's ransomware backup solution. He elaborated, saying, "Right now we are using seven-day journaling, but we're putting it on external storage or cloud. We're thinking about a one-year solution where we can go back to any particular point in time, bring the server back, and get all the files."

"We had a ransomware event on one of our file servers," said SmartBank's Chief Information Officer. He added, "We detected that event very quickly using other methodologies. However, because we had Zerto in place on that server, within about 30 minutes from seeing the problem, we were able to go back and recover that machine before that ransomware event had happened. This is a great example of the solution's ability to restore so quickly that it really helped us."

A Network Administrator at a small financial services firm described how Zerto will help with a ransomware attack, though he explained, "Thankfully, we have not had to use this product to recover from a ransomware attack or other disaster, but it would absolutely work in that case." For them, by replicating the data, if ransomware were to hit their production side, it most likely would not also lock the disaster recovery side. "This means that we would certainly be able to bring it up from there," he said. Alternatively, Zerto lets his team pick points in time, so they can just go back to the moment in time before the ransomware happened.



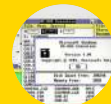
Ransomware Mitigation

Improving Disaster Recovery

Financial services firms need effective DR. Client relationships depend on it. Indeed, billions of dollars may be at stake. As the Manager/System Administrator put it, “We are a very heavily regulated organization because we’re working under SEC guidelines. We have large institutional clients like Morgan Stanley and Goldman Sachs. For them, we have to prove our resilience and our ability to work in any situation. If we cannot do that, they will pull their money out.”

A Wintel Administrator at a financial services firm with more than 5,000 employees added perspective, saying, “If you have a disaster, we don’t want your data to lag too far behind. You don’t want to be an hour or two days behind. When you recover an environment in Zerto, the data is current.”

She then went on to discuss how Zerto cut down the recovery time tremendously and improved the firm’s disaster recovery process. She said, “It made it easier for us to recover if needed during a disaster. Zerto definitely reduced downtime. The other software we used had a lot of manual steps. It was efficient, but our recovery time was longer. I estimate that Zerto cut our recovery time by at least 70 percent.”



Wendy B.

Wintel Administrator at a financial services firm with 5,001-10,000 employees



“When you recover an environment in Zerto, the data is current.”

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Chief Information Officer
at a financial services firm with
201-500 employees



“Because we had Zerto in place on that server, within about 30 minutes from seeing the problem, we were able to go back and recover that machine before that ransomware event had happened.”

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“The primary focus of Zerto was to give us the ability to fail over in the event of a disaster,” said the Vice President of Information Technology. “We’ve gotten pretty close to using it a couple of times, but fortunately, the disaster didn’t quite hit us. So, there is the peace of mind to know that we can fail over at any time and keep our operations.”

Further to this point, a System Engineer at National Indemnity Company, an insurance company with over 1,000 employees, remarked, “It makes me feel more comfortable that we have something to fall back on in case of a disaster.” For context, he added, “We are a large insurance company, so we have a lot of different applications and SQL Servers. We never had a disaster recovery site before, so this will protect us in the event of a disaster.”

Standardization is useful in DR, according to a Disaster Recovery Manager at a financial services firm with over 10,000 employees. He commented, “It [Zerto] allows us to have a unified DR approach where with one tool, we can meet the DR requirements of different systems with different levels of DR criticality and classification.”

This capability is important to them because they have customers for whom the availability of a particular system is crucial for business, and this system requires a very high quality of replication. He added, “At the same time, they also have systems that are not as critical. For a unified approach to the DR process, it is better to use the same DR tool for all applications with different levels of criticality. Instead of using different tools for critical and non-critical applications, it is better to use one single tool and have a unified process. Zerto helps us with that.”

The Sr. System Administrator spoke to the issue of scalability as it relates to DR. “From my perspective, Zerto’s scalability is very good,” he said. “We have 60 VPGs [Virtual Protection Groups] and 122 virtual machines that we’re using Zerto to replicate to our disaster recovery site. This will grow with any new infrastructure that we build. Any new servers, depending on their RTO or how soon we need to recover them, would be put into Zerto.”

DR testing is what mattered to the Network Administrator. He said, “We used to perform a disaster recovery test once a year, and it was painful because everything was manual. Now that we do it quarterly, we’re able to provide management with reports of the tests, which not only makes management happy but also makes various governing bodies happy.”

The Disaster Recovery Manager also relies on Zerto for DR testing. He said, “During our DR exercises, we try to simulate the worst-case scenario where a complete data center is unreachable, and we are able to achieve the required RTO. Zerto is able to fully meet our needs, and we are able to achieve the required RTO during our normal and yearly DR exercise.”



Rob M.
Network Administrator at a
financial services firm with
51-200 employees



“We’re able to provide management with reports of the tests, which not only makes management happy but also makes various governing bodies happy.”

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Migrating to the Cloud

The cloud offers a number of advantages for data protection workloads. For example, the Enterprise Infrastructure Architect shared that his company has saved money moving DR to the cloud rather than in a physical data center. He said, “We don’t have to buy another SAN [Storage Area Network], so it has saved somewhere in the \$150,000 to \$200,000 range.” Figure 2 shows this architecture.

“In terms of the implementation strategy, we knew what we needed. We wanted to get out in the cloud,” said the Enterprise Infrastructure Architect. “We focused on Azure to start with and then came back and looked at AWS after the fact for a couple of use cases where Azure wasn’t the best place for some big data sets.” For the Disaster Recovery Manager success meant using Zerto for DR in on-prem and hybrid cloud environments. He said, “It works well with different vendors.”



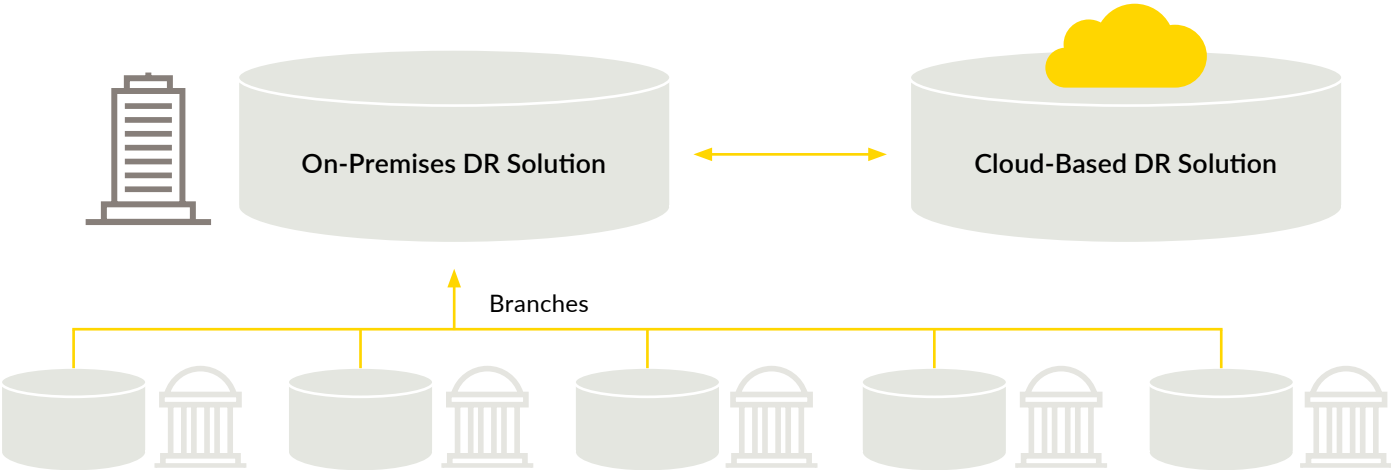
Enterprise Infrastructure Architect
at a financial services firm with
201-500 employees

★★★★★

“We don’t have to buy another SAN [Storage Area Network], so it has saved somewhere in the \$150,000 to \$200,000 range.”

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Figure 2 - Using cloud-based DR in addition to an on-premises solution.



Why Customers Choose Zerto Over the Competition

Financial services firms have multiple options to choose from for data protection. PeerSpot members who selected Zerto offered insights into what went into their choices. For instance, the Enterprise Infrastructure Architect had previously used Avamar Data Domain. “It had a very complicated process,” he said, “and the price was also very high. It did not have a similar granularity of recovery points.”

Complexity factored into the selection process for SmartBank’s Chief Information Officer. He said, “Our previous product was VMware Site Recovery Manager. We switched to get a less complex system that could protect our workloads better and enable faster recovery. Those were kind of the main reasons why we switched.” Similarly, the Sr. System Administrator, who had previously used Veeam, said that Zerto “seems to be a little bit more user-friendly in the UI.”

“There is actual real-time recovery,” said the Senior System Admin. “We still use things for backup and recovery, such as Dell EMC Avamar, which used to be NetWorker. We also use RecoverPoint for applications, but it is not at all the same. It [Zerto] is kind of a different animal.”

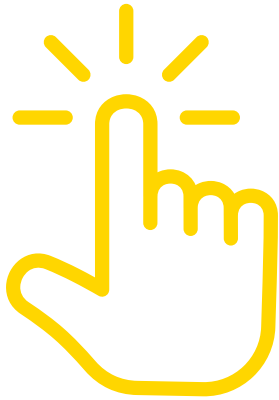


Chief Information Officer
at a financial services firm with
201-500 employees



“Our previous product was VMware Site Recovery Manager. We switched to get a less complex system that could protect our workloads better and enable faster recovery.”

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Easy to Use Versus Other Vendors

Prior to Zerto, a small financial services firm used VMware Site Recovery Manager (SRM). As their Network Administrator revealed, “We switched because it requires a lot of manual upkeep, and there is no automation involved unless you write the scripts.” He went on to say that while there are many freeware sites where one can download scripts, “we were spending a lot of time manually writing scripts and maintaining everything. This was really counterproductive for the amount of time we had available in a day. Essentially, SRM was replaced because of better interface automation and ease of use.”

The Manager/System Administrator likewise noted that their old solution, Double-Take, required a lot of scripts and “they were prone to mistakes.” He then said, “Zerto is so easy to use that when I showed it to my manager, he said jokingly, ‘Huh. I could use it myself. I don’t need you.’”



Protects Data in the Cloud

Other notable comments about selecting the right data protection solution included:

- “We previously used a site recovery manager from vCenter. It’s effective, but it requires a lot of manual steps, especially when we deal with databases and so forth. Zerto is quicker, more efficient, and easier on the eyes. I’m a huge fan.” - Wintel Administrator at a financial services firm with more than 5,000 employees
- “We have used SRM, who is Zerto’s main competitor. SRM was pretty quick. However, the speed of recovery with Zerto is so simple. It can failover, e.g., do whatever kind of failover you want it to do. You choose your VPGs, then you are off. It is really fast and simple. A lot of people could handle using it pretty easily.” - Virtualization Administrator at a financial services firm with more than 5,000 employees
- “We previously tried Veeam’s replication tool and it didn’t work out too well. That’s why we decided to go to Zerto. Zerto is much easier to set up and offers a faster speed of recovery.” - Systems Administrator at an insurance company with over 200 employees

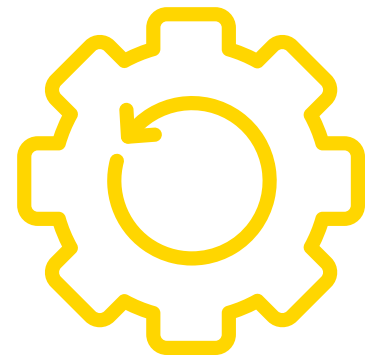


Virtualization Administrator
at a financial services firm with
5,001-10,000 employees



“The speed of recovery with Zerto is so simple... A lot of people could handle using it pretty easily.”

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**Reduces
Recovery Time**

Conclusion

Data is essential for any business, but in financial services data represents money—with all the client concerns and regulatory challenges that come with it. Ultimately, protecting that data is a critical workload in financial services; especially as firms move to hybrid cloud architectures and “always on” business models. As PeerSpot members explain in their reviews of Zerto, it is possible to get better at data protection, modernizing the process and bolstering ransomware defense and disaster recovery. The Zerto solution enables them to move data protection to the cloud, as well, which delivers benefits in terms of cost and efficiency. It’s a never-ending process, of course, with constant pressures to adapt to new ways of doing business and deploying digital assets. In this environment, PeerSpot members express a preference for Zerto due to its simplicity and ease of use.

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About Zerto

Zerto, a Hewlett Packard Enterprise company, empowers customers to run an always-on business by simplifying the protection, recovery, and mobility of on-premises and cloud applications. Zerto eliminates the risks and complexity of modernization and cloud adoption across private, public, and hybrid deployments. The simple, software-only solution uses continuous data protection at scale to solve for ransomware resilience, disaster recovery and multi-cloud mobility. Zerto is trusted by over 9,500 customers globally and is powering offerings for Amazon Web Services, Google Cloud, IBM Cloud, Microsoft Azure, Oracle Cloud, and more than 350 managed service providers. www.zerto.com