



NetApp®

## Success Story

# KSM Attains 95% Faster Access to Customer Records with VMware on FlexPod from NetApp and Cisco



Another NetApp solution delivered by:



Business and technology working as one



### KEY HIGHLIGHTS

#### Industry

Public Accounting and Professional Services

#### The Challenge

Scale with rapid company expansion by upgrading storage and server infrastructure.

#### The Solution

Reinvent the data center with VMware® vSphere built on the FlexPod® data center platform from NetApp and Cisco.

#### Benefits

- Reduces document indexing requirements from 2–3 hours to less than 3 minutes
- Avoids downtime costs, contributing to enhanced profitability
- Reduces time to acquire customer information by 95%
- Reduces RTOs by 92%, RPOs by 96%
- Safeguards customer financial information through robust disaster recovery

### Customer Profile

At Katz, Sapper & Miller (KSM), supporting growth and efficient business management are top priorities. In 2011, INSIDE Public Accounting recognized the top-100 firm as one of the nation's 50 most efficient and fiscally successful accounting firms. From just two individuals in 1942, the firm has grown to become one of the top CPA practices in the United States, with 275 employees across several facilities: in Indianapolis and Fort Wayne, Indiana; New York City; and Oklahoma City, Oklahoma.

### The Challenge

#### Better customer service, higher levels of billable time

In the tax and accounting business, maximizing time spent on productive billing is a major priority. Every hour of downtime can cost Katz, Sapper & Miller thousands of dollars in billings, and any compromise of sensitive customer financial data or records or the ability to find customer data quickly is unacceptable. To continually enhance customer service and achieve higher levels of billable time, the company requires an IT infrastructure with superb

performance, scalability, flexibility, and reliability to support a constantly growing business. The need for a streamlined technology infrastructure was underscored by the fact that KSM has a lean IT staff of only two people supporting the data center infrastructure.

KSM had outgrown its five-year-old IT infrastructure, an existing storage array that lacked the advanced functions that the company required. The company's data footprint is growing at roughly 25% each year, so capacity was becoming an issue. The existing storage array was also underperforming yet consuming more space and power each year. KSM needed a storage solution that would be far more efficient and cost effective. The same end of life was impending for KSM's application servers, indicating that it was time for a significant overhaul. KSM also wanted to ensure that it had a best-in-class way to replicate sensitive data to protect client privacy and pull it up whenever answering questions or finalizing tax returns.

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**Darrell Williams**

Director of Information Systems for Katz, Sapper & Miller

needed better, more advanced technology to improve both recovery time objective (RTO) and recovery point objective (RPO),” says Darrell Williams, director of Katz, Sapper & Miller’s Information Systems Department.

## **An infrastructure for more robust business management**

KSM professionals rely heavily on a host of software, with a customized Microsoft® SharePoint® system at the hub of all document management for its 16,000 client sites. Users need to quickly search and obtain data, yet document indexing search results were taking up to two to three hours.

In addition to Microsoft SharePoint for document management, the firm relies on several databases, as well as core accounting software applications for everything from tax and audit preparation to workflow and time and billing management. Additional key business productivity solutions include Microsoft Exchange.

## **The Solution**

### **A new storage upgrade strategy**

For a solution to support current and future business growth and streamline IT operations, Katz, Sapper & Miller selected Logicalis, a participant in the NetApp Partner Program and an international IT solutions and managed

services provider. The initial goal was to replace the incumbent storage vendor, strategically combine physical servers with virtualized machines based on VMware vSphere®, and move to more flexible Cisco® Unified Computing System™ (UCS™) blade servers. Logicalis recommended VMware vSphere built on FlexPod, a prevalidated data center solution from NetApp and Cisco built on a flexible shared infrastructure.

### **NetApp, Cisco, and Logicalis speed deployment and reduce business risks**

Williams was impressed with the simplicity, performance, and cost-effectiveness of FlexPod. He liked its best-in-class technologies, but he also was attracted to the approach of having several vendors with shared ownership. “Among the biggest benefits of FlexPod is having integrated components that help us to centrally manage all our data center requirements,” Williams says. “What we’ve seen is reduced risk because Cisco, VMware, and NetApp work so closely together.”

KSM’s core infrastructure is driven by a Cisco UCS server and a NetApp® FAS3240 storage system with plenty of room for expansion. The core switching environment consists of Cisco Nexus® and Cisco Catalyst switches, all tied together through NFS and CIFS protocols and speedy 10-Gigabit Ethernet connections. With VMware vSphere 5

built on FlexPod, KSM has virtualized all its core accounting software as well as its Microsoft databases. Microsoft Exchange is the next mission-critical application to be virtualized.

A valuable part of the solution is NetApp deduplication, a built-in feature of the NetApp Data ONTAP® operating system that eliminates the need for storing numerous instances of objects. This technology resulted in immediate reclamation of more than 400GB of storage. The company is also using thin provisioning so that spare capacity can be delivered quickly, without the need to overprovision storage up front.

A secondary, colocation site for disaster recovery, currently being implemented, is running a NetApp FAS2240 storage system and Cisco UCS servers with VMware vSphere for virtualization. From a software standpoint, administrators will use NetApp SnapMirror® software for site-to-site data replication between the two data centers. NetApp Virtual Storage Console (VSC) will reduce operating expenses with integrated, end-to-end storage management for the company’s VMware infrastructure.

## **Business Benefits**

### **Maximized billable time**

Supporting storage and document management on Microsoft SharePoint,



FlexPod has paid off with fast return on investment and greatly enhanced customer service. Data can now be uploaded quickly and then associated with a particular client in a fast, efficient manner. Each record is instantly searchable for improved content management and better customer service. Incremental data searches now take less than three seconds compared to two to three hours with the previous systems—a 95% reduction in the time required to obtain customer information. “The ability to find information quickly is essential to our business,” Williams says. “When clients call, we have the information we need at our fingertips, in seconds, so we can be much more responsive.”

#### **Faster, more reliable data replication and recovery**

Delays, downtime, and the potential costs associated with these problems are no longer an issue. Previously, it was not possible to replicate all of the company’s data without downtime, creating potential risks and loss of data from using tape. But, today, RTO and RPO times have been reduced exponentially by more than 90%. Previous RTOs are down from 48 to 2 to 4 hours. RPOs have been reduced from 24 hours to less than 1 hour. The company also plans to

implement NetApp SnapManager® for Microsoft Exchange and Microsoft SQL Server® in the future to streamline storage management and simplify configuration, backup, and restore operations for its Microsoft environments. “Integration among the FlexPod components has saved us substantial time, and we can replicate our entire VMware environment with the same workflow and resources that used to be required previously when we were replicating data across two sites,” says Williams.

#### **Lower IT costs, with more reliable, productive outcomes**

Today, the vast majority of KSM’s environment is virtualized on FlexPod, including accounting modules and Microsoft SharePoint. This allows newly created documents to be searched, indexed, and found by KSM professionals in minutes. The primary node for the Microsoft SQL Server applications is on a physical server, with a passive node on a VMware virtual server within the FlexPod environment. According to Williams, the company is thrilled with how quick it is to provision a virtualized server, including the ability to add blades very easily, and have high availability among the blades. If one blade fails, the system migrates to the other blades automatically, resulting in higher levels of uptime and reliability.

#### **Cost-effective foundation for mission-critical systems**

For KSM, a company that prides itself on staying on the cutting edge, most IT equipment is routinely phased out once it reaches the 60-month standpoint. When it came time to update the new data center and equip a second one, Williams looked at Cisco and NetApp and both companies rose to the top—their integration with VMware was icing on the cake.

Williams says he is genuinely impressed with the new FlexPod solution and the flexibility and reliability it provides. He believes it is the simplest, most future-ready data center infrastructure out there.

“There’s a lot to love, even down to the tiny details like cabling. We are amazed how clean, powerful, and efficient FlexPod based on NetApp and Cisco is in our data center,” says Williams. “And we’re thrilled to have a more scalable solution that will allow us to respond quickly and accommodate our ongoing rapid growth well into the future.”

#### **About Logicalis**

Logicalis is an international IT solutions and managed services provider with a breadth of knowledge and expertise in communications and collaboration; data center and cloud services; and managed services. Logicalis employs almost

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3,000 people worldwide, including highly trained service specialists who design, specify, deploy and manage complex ICT infrastructures to meet the needs of over 6,000 corporate and public sector customers. The Logicalis Group has operations in the UK, U.S., Germany, South America and Asia Pacific. The Logicalis Group is a division of Datatec Limited, listed on the Johannesburg and London AIM Stock Exchanges, with revenues of over \$5 billion.

#### SOLUTION COMPONENTS

##### FlexPod Components

NetApp FAS3240 storage system

NetApp FAS2240 storage system

Cisco Unified Computing System (UCS) blade servers

Cisco Nexus Series switches

Cisco Catalyst Series switches

##### Virtualization Components

VMware vSphere 5

##### NetApp Software

Data ONTAP 8.1

Deduplication

Thin provisioning

SnapMirror

##### Protocols

CIFS

NFS

##### Partners

Logicalis

[www.us.logicalis.com](http://www.us.logicalis.com)

Cisco

[www.cisco.com](http://www.cisco.com)

VMware

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