

Disaster Recovery Services Offer Credit Union a Tested Safety Net for Data and Applications

CASE STUDY

Highlights

Client



- ▶ Industry: Financial Services
- ▶ Headquarters: Rapid City, SD

Challenge

The credit union wanted to replicate all of its critical data and systems to ensure their operations were not at risk of downtime and permanent data loss.

Solution

Xigent helped BHFCU create a customized Disaster Recovery as a Service and Backup as a Service plan with documented failover and run capabilities, tested and proven through yearly testing.

Result

The credit union has cost effective protection replicating all critical systems, saving staff time and proving recoverability and compliance through scheduled testing and documentation.

The Challenge

Since 1941, Black Hills Federal Credit Union has served as a trusted financial partner for its members, helping them improve their financial well-being through personal, business, and agriculture banking. Over the years they have grown and added loans, savings, investment services, insurance, credit cards and protection products, servicing more than 80,000 members at 15 member service centers across South Dakota.

When John Buxton, Senior VP/CIO, Information Security Officer, took over IT for the credit union in 2014, he discovered some gaps in their self-managed backup and recovery systems. Some critical data and applications were not being replicated and testing limitations reduced his confidence in their ability to recover.

“We determined pretty quickly that we just didn’t have the flexibility or the ability to fully recover in the way that we wanted,” Buxton said. He sought out a technology partner that could help them meet their objectives: a system that would fully replicate their data and applications, and regular testing and demonstration of their ability to recover all critical systems.

This was no easy task as BHFCU has a complex IT infrastructure integrated with several third-party systems. The credit union’s recovery infrastructure had to connect virtualized systems, along with unix-based infrastructure to both their production and disaster recovery site and offer uninterrupted service to members and staff. “We were trying to do it ourselves, but this was really, really difficult. It’s one thing to set it up and kind of believe that you can do it, but it is much more difficult to really test and document the process,” said Buxton.

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The Solution

BHFCU met with a variety of vendors but found few with the expertise or capabilities that they were looking for. Buxton said he wanted to find a managed services provider who could be a good long-term partner who really understood their business objectives. “With everything we do, the question is always ‘how is this going to improve service to members?’ It’s talked about in almost every meeting.”

Xigent met with BHFCU to review its business impact analysis and put together a plan that addressed the credit union’s IT needs, fully understanding their unwavering commitment to customer service for members. The plan based on current facts and findings from the analysis included leveraging Xigent’s Disaster Recovery as a Service and Backup as a Service, and extending their data center network.

The credit union and Xigent worked together to improve and evolve the system for future needs, adding failover and run capabilities. While this level of recovery was above and beyond what industry regulators currently required, the credit union wanted to stay ahead of future mandates. To offer the company the ability to verify and document that all of their critical data was fully recoverable, Xigent implemented a capability for BHFCU to test their systems by failing over from their production to their recovery site hundreds of miles away.

Every year the entire company tests the recovery by running all critical systems from the disaster recovery infrastructure. It is a seamless experience for staff and credit union members. Buxton said they are able to verify that their data is there, and that few people outside IT even realize that anything has changed. “When we do testing and we do failover, it’s not just a failover to say, ‘Yep, it works. It’s over there.’ We run like we would on our production site at our recovery location and it’s so good that nobody notices.”

Buxton says it is hard to compare their former disaster recovery efforts with today’s system, as the Xigent managed plan delivers so much more. BHFCU has gone from not even having a plan to back up critical systems, to having every mission critical function and database continuously replicated at a second site. And most importantly, it is proven through testing every year.

“There’s a trust level. It’s not about [Xigent] trying to sell you something; it’s about them understanding your business and seeing a way to address any gaps.”
- John Buxton, SVP/CIO

BHFCU Objectives	Before Engaging Xigent	After Engaging Xigent
Reduce risk of downtime and data loss	Some essential data was not backed up and there was no confidence in platform recoverability	All critical components run on-premise with continuous data protection
Maintain recovery system with a known monthly cost	BHFCU expended both staff and equipment budget maintaining both production and DR sites	BHFCU has known monthly costs, along with less personnel expense, as Xigent maintains recovery systems
Test and document recovery for confidence about capabilities	No assurance that the recovery system works as planned	Bi-annual scheduled failover testing by running production from a remote secondary site, including documentation that can be used for compliance audits
Gain a relationship with a trusted tech partner/advisor	BHFCU staff manage all IT functions	Xigent provides ongoing consulting on right-fit technology and IT strategy
Build recovery into cyber security plan	No confidence of business continuity after disruption	A multi-layered cyber security approach that includes the ability to recover data and systems
Get long-term data protection and recovery for less critical systems	Identified recovery gaps in tier 2 and 3 systems	Complete Backup as a Service (BaaS) and recovery for tier 2 and 3 systems, including Microsoft 365

Why Xigent?

Result Driven IT

Xigent is committed to delivering greater business outcomes through IT excellence. We partner with you holistically, engaging as your local IT provider on a strategic and tactical level to help you succeed. At our core, we are:

Outcome Focused

We help elevate IT to what it really should be—a critical component of your business success. Our team of experts work with you to take your IT projects to the next level by achieving goals and developing solutions to transform your organization. At Xigent, we don't sell boxes, we solve.

Process Driven

We leverage best-practice standards and a proven process that produces consistent results and establishes a Result Driven IT approach within your organization. At every step, we define success as more than properly functioning technology, we take pride in creating IT solutions that tie to desired business outcomes and capture the buy-in and approval of key players within your organization.

Intentionally Designed

We value right-fit relationships and client service in everything we do. That is why we specialize in IT services and solutions for mid to large organizations with a focus on the Midwest and Plains states.

The Result

If the BHFCU IT team had to duplicate everything that Xigent does for them, it would take a considerable amount of time and would not be done as efficiently, Buxton said. “We probably wouldn't have the same expertise level that Xigent has which would lead to even more work and more employees needed to try to do the work. Our partnership with them allows us to concentrate on member-service related tasks.”

The scheduled failover testing makes it easy for the credit union to maintain compliance, prepare for audits, and meet governance requirements. “We can easily provide the documentation and the details required for compliance purposes. It's all right there,” Buxton said.

“Our members' trust is our top priority. If there are issues in the local area and other systems are down, we're not. It's a confidence level they have with us.”
– John Buxton, SVP/CIO

Today, BHFCU leadership know that even in an emergency, they will not lose essential data. Their members do not know what goes on behind the scenes, but they notice that the credit union always meets their needs. “Our members' trust in us is our top priority. If there are issues in the local area and other systems are down, we're not. It's a confidence level they have with us.”

The credit union has moved from a situation where critical data and systems are not properly backed up, to having a well-managed recovery system that BHFCU IT staff fully understand. Buxton says his team has confidence that in the worst-case scenario, BHFCU will have the flexibility to recover everything they need to serve their members.

“With IT, you're constantly evolving, and I don't know that you ever say that you're done, but we're in a really, really good spot. When you've got a great partner like Xigent, that makes it easier,” Buxton says.

Get the Right Level of Data Protection and IT Support for Your Organization

Call [800-298-9543](tel:800-298-9543) to connect with an IT expert at Xigent today! Or visit www.xigentsolutions.com to learn more about Disaster Recovery as a Service and our full range of IT services.