

Leading Financial Firm CAPTRUST Reduced Outages by 90% and Increased Bandwidth 4X

CAPTRUST, a leading investment services firm headquartered in Raleigh, North Carolina advises on more than \$360 billion in client assets under advisement and advisors located across 40 regional offices throughout the United States. The firm provides a wide range of investment advisory services to institutional clients, endowments and foundations, and high-net-worth individuals, including corporate executive, business owners, and professional athletes.

Having grown both organically and through acquisition, the CAPTRUST technology team was seeking to stay ahead of increasing bandwidth and security demands of the regional offices and needed to upgrade quickly. The then-current MPLS-connected infrastructure was not delivering the user experience needed at the regional offices. "We've been acquiring five to seven businesses a year for a while, and those businesses, in turn, may have one to five offices. With the MPLS network and the carriers, we were struggling to get those people onboard quickly enough," said CAPTRUST CTO Jon Meyer.

With CAPTRUST's hub-and-spoke Multiprotocol Label Switching (MPLS) network, the process of setting up a new office could take as long as 120 days. As the network grew, the likelihood of site outages caused by MPLS



ABOUT CAPTRUST

Founded in 1997 in Raleigh, North Carolina, CAPTRUST is an independent registered investment advisor with more than 650 employees nationwide and \$362 billion in client assets. An employee-owned firm, CAPTRUST provides investment advisory services to retirement plan fiduciaries, endowments, and foundations, and comprehensive wealth planning services to executives and high-net-worth individuals. CAPTRUST's mission is to enrich the lives of its clients, colleagues, and communities through sound financial advice, integrity, and a commitment to service beyond expectation. The firm also operates the CAPTRUST Community Foundation, a charity focused on meeting the needs of underserved children.

circuit failure grew, to the point that it was not uncommon for at least one regional office to lose connectivity every month. During these outages, there was little the technology team could do to restore service other than implore carriers into action. A site outage could last business days, forcing regional office personnel to make alternate work arrangements and keeping them from their principal focus: growing and nurturing client relationships.

CAPTRUST needed increased bandwidth, a faster process to establish new service, and real redundancy when connecting new regional offices to its network. Executives and IT managers began seeking an alternative to their dated MPLS setup and found CloudGenix Autonomous SD-WAN as the perfect solution.

Fast, easy set up for new remote offices

Once CAPTRUST established core WAN controllers at primary and secondary data centers, CloudGenix's solution made it easy for CAPTRUST's technology team to roll out SD-WAN to each regional office. First, MPLS was paired with direct-to-Internet circuits to create a hybrid WAN with local Internet breakout. Then, eventually, MPLS was eliminated entirely, replaced with second direct-to-Internet circuits. "We selected CloudGenix because we thought the product was ahead of our incumbent suppliers' capabilities," Meyer said.

CAPTRUST sees downtime drop 90% and bandwidth grow 4X

In addition to speeding up the integration of new office sites, CAPTRUST used CloudGenix to attain reliable, redundant, and affordable bandwidth that is vital to keeping employees productive. As business-critical applications, including core CRM software and email shifted to the cloud, CloudGenix SD-WAN's and direct-to-Internet connections reshaped traffic flows, reducing the inevitable bottlenecks of a hub-and-spoke MPLS network. Additionally, outages are happening 90 percent less than before because of circuit redundancy. "We weren't going to be able to build an affordable hub-and-spoke network and give our employees the kind of performance they needed with the resiliency and redundancy that we needed, without CloudGenix," Meyer said.

CAPTRUST leveraged CloudGenix's affordability and "active-active" connections to increase their bandwidth by four times with zero increased spend. "Without CloudGenix, and without an SD-WAN, our ability to manage our growth and keep people on our network, while having a consistent technology operating model would be diminished," Meyer said.

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A cloud-delivered security solution

Having seen the overwhelming positive results with the CloudGenix SD-WAN, CAPTRUST wanted to leverage it for a cloud-delivered security solution, aiming to deliver a zero-trust model. It was crucial to choose a best-of-breed solution while also avoiding additional hardware expenditures. They found what they needed in CloudGenix CloudBlades. “In the past, IT would have to compromise between deploying best-of-breed products vs. increasing the number of hardware devices required in the regional offices. With CloudBlades, we can deploy cloud-based security solutions while getting the same impact as if the security solution were physically deployed in the remote office,” says Meyer.

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ABOUT CLOUDGENIX

CloudGenix makes the cloud-delivered branch possible by providing an Autonomous SD-WAN™ and the Cloud-Blades® platform. Enterprises gain cloud-scale economics for the branch with the freedom to use any WAN, any cloud and any best-of-breed infrastructure service. Founded in 2013 by a team that has delivered industry-leading products in networking, SDN, cloud, security and web-scale applications, CloudGenix serves world-class financial services, legal, retail and technology organizations.