

Keel Point: Realizing the Benefits of Cloud-as-a-Strategy

Financial Services Firm Leverages the Evolve IP OneCloud™ for Integrated Solutions including: Virtual Desktops, Disaster Recovery, IP Phone System and Infrastructure-as-a-Service

Keel Point is a nationally recognized, independent investment advisory firm. Its wealth management advisors leverage person-to-person relationships, decades of experience, and a passion for strategic investment to aid its clients to “investing in their purpose.” Through mergers with like-minded family wealth advisors, Keel Point has grown to more than \$1.45 billion under management. The firm currently has six offices with locations in Alabama, Tennessee, Virginia and Kansas.

To best support high-touch client engagements with strategic and custom-built investment recommendations, the executive team realized they needed an equally sophisticated, integrated and custom technology infrastructure. Keel Point executives were interested in the benefits of cloud-based solutions, but needed the IT team to think through planning and implementation.

Would cloud services be sufficiently reliable, easy to manage, cost effective and secure? As Keel Point would soon find out, only one cloud partner in the country could deliver a comprehensive cloud strategy and deploy enterprise-grade solutions that met their unique business needs.

The Path toward a Cloud-Enabled Business

When Scott Jenkins, Director of Information Technology, joined Keel Point in March 2016 he was tasked with a major IT overhaul. Time was of the essence and almost immediately upon joining, Jenkins was charged with outlining options to meet the firm’s unique IT needs.

Keel Point aimed to streamline disparate IT components, an expansive data center and an abundance of underutilized servers acquired through mergers. It was also important that the IT team help advisors become more accessible to clients by enabling associate mobility. Above all, Keel Point recognized that a next-generation IT solution was needed to ensure regulatory compliance by improving security of its critical data. All this while controlling costs and IT resources.

Jenkins and his team identified that their IT challenges were best addressed by cloud-based solutions, which drove their first steps. Keel Point would begin with migration to Infrastructure-as-a-Service (IaaS), then would add in Desktops-as-a-Service (DaaS), Disaster Recovery as a Service (DRaaS) and IP phone systems in select offices.



The project was significant, and Jenkins knew he needed a long-term partner focused on strategy; a firm that was vested in Keel Point’s success. He also required best-of-breed solutions that could be customized and higher levels of support. The company had a long-standing relationship with CDW, which it enlisted to help investigate options and in April 2016, Keel Point engaged with Evolve IP.

Evolve IP, with a strategy-first approach to cloud, and the ability to deploy both cloud computing and cloud communications via The Evolve IP OneCloud was the ideal partner for Keel Point. Boasting highly customized configurations, all within the Evolve IP virtual private cloud environment, Keel Point would be able to virtualize its data centers and servers, improve its disaster recovery policies and deploy cloud-hosted desktops and phones with Evolve IP’s best-of-breed solutions.

Leveraging the Evolve IP OneCloud™

To start, Keel Point consulted with Evolve IP on a customized deployment strategy and migration roadmap that would ensure immediate concerns were met while also optimizing for future

Scott Jenkins
Director of Information Technology-
Keel Point

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solutions. The first deployment involved integrating data centers as each of the firm's six offices were operating siloed, on-premises data centers, and only one location was virtualized through VMware.

"The multiple hardware-based systems hampered our IT capabilities, with a lack of connectivity between data centers," said Jenkins. "For instance, large client files were sent via email and stored locally in multiple locations."

With this immediate need identified, Keel Point's IT overhaul began with migration to Evolve IP's virtual private cloud. Evolve IP's Infrastructure-as-a-Service solution provided Keel Point with an enterprise-class computing environment, the ability to spin up resources as needed, and true customer isolation to ensure security. Additionally, Keel Point leveraged Evolve IP's 3rd party compliance audits for PCI and SOC 3 to meet regulatory compliance requirements.

The migration was built on extending on-premises Active Directory and group policies to the cloud, where users could then access cloud-based resources mapped to their login credentials. The result: Keel Point associates in all offices can seamlessly connect with centralized servers for access to enterprise applications and data as though the servers were sitting within their office.

With its data now hosted in the Evolve IP virtual private cloud, Keel Point had significantly improved its IT resilience and business continuity strategies. Next, they deployed DRaaS ensuring that the firm met recovery time and recovery point objectives as defined by regulatory compliance.

Keel Point has already fully migrated three offices to the cloud with great success. Jenkins said the migration takes anywhere from two to three weeks to up to two months depending on the complexity of the environment and the levels of customization needed. But nearly immediately, the firm was able to project lower IT costs by only using the server resources they actually need. They also expect a reduction in physical costs associated with on premise data center management such as power HVAC and maintenance.

For offices with the new virtual data center in place, Keel Point has added additional cloud-hosted IT solutions. Desktops as a Service are improving associate mobility while decreasing resources spent on desktop management. Keel Point desktops are now hosted in the Evolve IP cloud which enables associates to access their own personal workspace anywhere, at any time, on nearly any device, all for a predictable monthly fee.

"Our executives can now travel to different locations, simply find an empty office or workstation and log-on to access their own desktop environment," Jenkins said. "We gained an immediate increase in mobility within single offices and as well as from office-to-office without having to buy every associate a new laptop."

Jenkins also recounted how easy it is to onboard a new associate. "Evolve IP provisioned a workstation for a new employee within a half hour," Jenkins said. "That speed is important as we continue to grow."

Looking ahead, Keel Point plans a migration from a legacy PBX system

to Evolve IP hosted IP phone solution, providing an enterprise-grade hosted PBX with advanced unified communications and business collaboration features.

Why Cloud Services?

Jenkins believes in the tangible business advantages the cloud delivers and the return he anticipates from the Evolve IP OneCloud services. Not only is he assured of IT system security and availability, but cloud services future-proof the firm's IT infrastructure. The firm eliminates risk of hardware or software quickly becoming obsolete and can add in services, such as enhanced security or reporting mechanisms, should regulations change.

From a financial lens, Keel Point benefits from shifting IT from a capital expense, with peaks of spend as systems need to be replaced or upgraded, to a predictable operating expense. Further, cloud services inject transparency into the IT budget as Jenkins is able to provide an accurate estimation of ongoing IT expenses.

However, as Jenkins anticipated, the benefits of cloud services are far greater when a single vendor serves as his company's partner.

"Forget about square peg in round hole. When making the decision to choose our cloud services partner, I don't even want to try to fit an oval peg in a round hole," said Jenkins. "Cloud services need to be truly custom for our environment, but build on solid technology, which is exactly what Evolve IP provided."

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Scott Jenkins
**Director of Information Technology-
Keel Point**

Keel Point

LOCATIONS:

Huntsville, Alabama; Leewood, Kansas; Brentwood and Chattanooga, Tennessee; Vienna and Purcellville, Virginia

INDUSTRY:

Investment, Wealth Management

CUSTOMER PROFILE

Keel Point is a nationally recognized, independent investment advisory firm with more than \$1.45 billion under management. Its wealth management advisors leverage person-to-person relationships, decades of experience, and a passion for strategic investment to aid its clients to "investing in their purpose." The firm has more than 60 associates working across six offices with locations in Alabama, Tennessee, Virginia and Kansas.



PRODUCTS

- Infrastructure-as-a-Service
- Desktops-as-a-Service
- Disaster-Recovery-as-a-Service
- IP phone



BUSINESS SITUATION

Keel Point continues to grow through mergers and acquisition. To support growth and maintain high-touch client engagements, the executive team looked to adopt a sophisticated, integrated and custom technology infrastructure. The firm aimed to streamline disparate IT components, improve associate mobility and ensure regulatory compliance while controlling costs and IT resources.



SOLUTION

Keel Point turned to Evolve IP, with a strategy-first approach to cloud, to deploy both cloud computing and cloud communications via The Evolve IP OneCloud was the ideal partner for Keel Point. Within the Evolve IP virtual private cloud environment, Keel Point migrated to Infrastructure-as-a-Service (IaaS), then added in Desktops-as-a-Service (DaaS), Disaster Recovery as a Service (DRaaS) and IP phone systems in select offices.



BENEFITS

- Virtualized data centers and servers to better utilize resources and improve IT resilience and business continuity strategies
- Deployed cloud-hosted desktops and phones to enable associate mobility
- Shifted IT from a capital expense to a predictable operating expense

OVERVIEW

Keel Point looked to overhaul its IT infrastructure to ensure business continuity, improve associate mobility and meet compliance requirements all while controlling IT costs and resources. The firm found a partner in Evolve IP, the only cloud services provider that could deliver a comprehensive strategy and deploy enterprise-grade services on a single solution, the Evolve IP OneCloud.

ABOUT EVOLVE IP

Evolve IP is The Cloud Strategy Company™. Designed from the beginning to provide organizations with the ability to deploy both cloud computing and cloud communications onto a single platform, today, nearly 200,000 users rely on Evolve IP for services like disaster recovery, contact centers, unified communications, virtual desktop services, IaaS and more. With deployments across the globe, Evolve IP provides cloud services in virtually every industry with specializations in the healthcare, finance, veterinary, retail, legal, and insurance verticals.