

# Case Study: Matrix Group

MATRIX

## Double-Take® Software Customer Profile

**Company:** Matrix Group Ltd <http://www.matrixgroup.co.uk>

**Business:** Matrix Group is a privately owned financial services business founded in 1987 whose areas of expertise include Asset Management, Corporate Capital, Property and Specialised Finance. The company has around 160 staff, based primarily in London.

**Needs:** To implement a full disaster recovery and continuity strategy for the company to ensure that business-critical applications such as email can be up and running from a remote location within the recovery time objective of thirty minutes.

## Project Overview

In the competitive, fast-paced world of financial services, the ability to offer quality service is a crucial differentiator. An organisation's IT infrastructure is key to ensuring that employees have the right information and applications available to them, allowing them to deliver on client requirements. The Matrix Group is no exception – with operations across investment banking, hedge fund management and project finance, IT plays a vital role in how the company services its customers.

Laurence Duff, IT Manager at Matrix, is responsible for the group's I.T. infrastructure. Previously, the company's servers and services were all held on-site, and in the event of a disaster, recovering these servers would require the images to be loaded onto server hardware. Once the servers were fully updated, then the physical machines could be delivered to the company's disaster recovery (DR) location, or any other destination of Matrix's choice.

In total, this process would take between one and three days to restore all the company's applications, depending on the amount of data to be restored and the number of servers that needed restoring. While the process ensured that Matrix would be able to recover its data if a disaster struck, it would still lead to a period of downtime that would significantly impact on day-to-day activities across the group.

Laurence recognised that this could be improved, and the window of downtime could be shortened further. *"In the event of a failure, we estimated that it would probably take up to a day to have key systems back up and running successfully. For most organisations, this would be acceptable, but for Matrix we wanted to reduce this recovery time further,"* said Laurence. *"An incident where staff were locked out of the company's offices also showed us how access to business-critical systems from anywhere would be beneficial to us."*

## Purchase Process and Decision

Laurence started looking for alternative approaches that would both shrink the amount of time required to get applications back online, as well as allowing Matrix employees

to access business-critical systems remotely, should the entire office be inaccessible. Working with the Matrix Group board, Laurence also wanted to have email services available within 30 minutes of a disaster, and accessible from any alternative location.

*“Email is a critical application for us – it means that we can communicate with our clients and ensure that their expectations are met,” explained Laurence. “The incident we went through - whereby our IT systems were all fully operational but our staff could not access them - also demonstrated how valuable remote access would be for the future alongside improved protection for our other applications.”*

With these criteria in mind, Laurence worked with one of its IT solutions providers oncore IT to define the applications that would have to be protected by the new DR solution. This list included Microsoft Exchange, Microsoft SQL Server (within this, financial databases), Blackberry Enterprise Server, Microsoft SharePoint and Microsoft CRM, as well as infrastructure services such as the group’s Domain Controllers and File Stores. Overall, a comprehensive new approach to protecting these systems was required to provide true business continuity. After going through the solutions available, Laurence, in partnership with oncore IT, chose Double-Take® Software to provide the core replication platform at the heart of the new DR strategy.

*“We chose Double-Take Full-Server Failover software because it has highly efficient replication protocols, an advanced application manager tool and reliable global customer support. It also covers all the various applications that are deemed critical for our business, from our complete messaging and communications system through to our financial databases and CRM systems,” explained Laurence. “Finally, the byte level replication provided by Double-Take means that we have been able to improve our recovery point objectives, leading to less potential for data loss.”*

### **Double-Take implementation**

Laurence and oncore IT deployed Double-Take on 10 production servers within Matrix Group’s data centre to replicate information over a WAN to oncore IT’s remote data centre. At this DR site, the back-up servers were hosted as virtual machines running on a VMware virtual infrastructure.

In the event of a failure, the DR servers can be efficiently recovered to ensure recovery time objectives are met. In addition, Double-Take provides an automated method of recovering production servers when failing back from DR equipment, thus improving the speed at which the organisation can be up and running again after a disaster occurs.

Following the completion of the implementation, Laurence carried out two full tests of the new strategy, firstly out of hours and then in work hours during a live DR test phase. These tests were successful, and proved that if a real disaster occurred involving any business critical applications, an immediate failover is automatically up and running for resilient business continuity within minutes.

*“This solution has not only achieved Matrix Group’s recovery time objective (RTO) of 30 minutes in the event of a disaster, it has in reality brought the recovery time down much further. The full recovery and access to business-critical applications and servers, such as SQL, Exchange and BlackBerry now takes about 5 minutes and is sometimes immediate, depending on the appropriate action at the time,” said Laurence.*

### **Conclusion**

Laurence commented: *“With the failover system and disaster recovery service in place, we now have a highly resilient, reliable and predictable IT system. We know that should our IT systems fail, we have a spare set of servers ready to kick into action and should the spare set of servers also fail, such as from a blackout or office disaster, oncore IT has all of our data saved, ready to be restored to whichever temporary office we are allocated. I can now assure the board that our business will still be able to function even if our IT systems fail.”*

### **About Double-Take® Software**

Headquartered in Southborough, Massachusetts, Double-Take® Software (Nasdaq: DBTK) is a leading provider of affordable software for recoverability, including continuous data replication, application availability and system state protection. Double-Take Software products and services enable customers to protect and recover business-critical data and applications such as Microsoft Exchange, SQL, and SharePoint in both physical and virtual environments. With its unparalleled partner programs, technical support, and professional services, Double-Take Software is the solution of choice for more than ten thousand customers worldwide, from SMEs to the Fortune 500. Information about Double-Take Software's products and services can be found at [www.doubletake.com](http://www.doubletake.com).

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### **About oncore IT**

oncore IT provides a 24/7, 365 days a year managed IT service for small and medium sized businesses, incorporating both hardware and software for a complete outsourced IT solution. oncore IT partners with best of breed vendors to provide an IT management service that only a large corporate would normally have access to. Services include: remote IS management; provision of all hardware equipment and software licenses; disaster recovery; remote (offsite and online) backup and recovery; desktop management and assistance; equipment hosting and replacement; monitoring and alerting; network access services; bandwidth management; firewall provisioning; and email filtering. For more information, please visit the company's website at [www.oncoreit.com](http://www.oncoreit.com) or call 08451 489248.

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