



# Global Bank Achieves Greater Efficiency, Regulatory Compliance for Voice Recording Archive with Cohesity SmartFiles

## INDUSTRY

Financial Services

## USE CASE

Scale-Out NAS

## COHESITY SOLUTIONS

Cohesity DataPlatform

## SOLUTION PARTNERS

HPE

## Key Benefits

- Dedicated infrastructure for sensitive data to meet regulations including SEC Rule 17a-4, CFTC, FINRA, and GDPR
- Cost-effective solution with comparable cost to low-tier cloud archiving
- Migrated nearly one billion files from tape to the Cohesity DataPlatform
- Integrated NAS ecosystem with antivirus, file audit, and enterprise search capabilities across all file metadata and file content

Banks and other financial services companies manage a tremendous amount of data. A global bank recently reviewed its entire data management strategy from the ground up, with a focus on reducing data silos and efficiently and securely managing large volumes of unstructured data. A particular piece of its IT environment, its voice recording archives, falls under the umbrella of e-communications (eComms) and contains more than 1PB of data.

Gartner issued a Market Trends report for the Mobile Voice Recording industry and confirms that regulatory compliance is a primary motivator behind a search for new solutions, and that providers delivering value-add services like search and security to archival storage will be key. In addition, Gartner predicts increased migration to the cloud for better economies of scale, lower TCO and elasticity.

While voice and eComms management is a concern across a wide variety of industries, financial services IT teams are held to higher standards than most. Voice archiving in the banking industry is more complex than many other industries because data is collected from a wide variety of sources including: traders, customer-facing agents and transactions, trading floor voices, and telephone calls, to name a few.

All recordings of telephone conversations are considered to contain personally identifiable information (PII) and enterprises must meet regulatory requirements for privacy compliance. On top of that, data sovereignty laws dictate that certain data may not leave a corporate perimeter or cross geographic boundaries, and often all data must be retained indefinitely for discovery reasons once other regulations are met. The recent worldwide financial crisis brought greater levels of compliance to the forefront. Regulations like GDPR and the California Consumer Privacy Act have added complexity to an industry with burgeoning amounts of data.

## Challenges

Effectively addressing data management issues within this environment, as well as meeting internal business requirements, was a complex undertaking. The bank faced challenges with data sprawl as data was spread out across numerous locations, and was formerly never deleted. All data was traditionally backed up to tape and the company desired to move all assets from tape to digital. Tape media formats were aging, and the process of data recovery from tape could take weeks to months when retrieval was required.

Operational cost was a main driver for the project, and the bank set out to identify a solution for 'lift and shift migration' that would result in reduced complexity and increased time savings. Whereas the archives contained nearly one billion files, voice recordings cannot be deduplicated, and one folder could contain up to 500 million files and directories. Another concern was data protection of these assets. Previously, it could take several months to over a year for a full restore or copying in order for data migration to complete. The bank also wanted a reliable disaster recovery solution for its voice archives.

The financial services company required the following capabilities in a data management solution:

- Lower TCO to deploy a scalable, cost-effective solution
- Single web-scale platform for simplified global management
- Replace Dell EMC Isilon for consolidated data management
- Reduced data recovery times

## Solution

This global bank issued an RFI and evaluated more than a dozen vendors over several months narrowing down to half a dozen solution providers for an RFP. The bank did a Proof of Concept (PoC) with Cohesity before deciding to move forward and implement Cohesity for data management of its voice archiving system replacing Dell EMC Isilon, as well as for continued conversion of its tape assets to digital format.

The bank deployed Cohesity for scalable file services to manage its voice archives from a single, web-scale platform—creating efficiency for the Voice Recording Engineering IT team. Today, one production

Cohesity cluster is in place with more than 1PB of target data under management, with a second cluster deployed for replication and disaster recovery.

Cohesity allows the IT team to have greater availability of and insight into data with Cohesity's built-in search functionality. Looking ahead, the bank is considering tiering some of its data to AWS Glacier for long term retention.

## Results

Primary benefits with Cohesity were cost savings and scalability. With hundreds of millions of files, and without the ability to deduplicate, Cohesity proved invaluable for file and object services. The web-scale capability of Cohesity infrastructure is comparable to AWS Glacier and cost competitive with other low-tier cold storage. While the bank will look to eventually migrate select data to the cloud, the near term cost savings with Cohesity are already delivering significant return on investment.

Cohesity enabled the bank to eliminate disparate systems, and have access to its data from a single, easy-to-use management console. Challenges related to data sprawl for voice archives are now easier to manage with Cohesity, and a consolidated solution allows the IT team to focus on gathering insights from the data, rather than simply managing it. As a result, the company is now looking to Cohesity for file and object services in other areas of the business that have latency insensitive workloads, such as other archives, corporate file shares, and home directories.

The global bank realized many benefits with Cohesity including:

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Learn more at [Cohesity.com](https://www.cohesity.com)

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