

IT Systems Management for Financial Institutions

Banks want to use technology to work smarter, better and faster – all the while doing more with less. Automated IT systems management is helping them reach those goals in a seamless, efficient manner.



Kaseya

Automated IT systems management, or IT automation – where software manages the routine, day-to-day tasks of IT maintenance – is helping financial institutions of all sizes work smarter, better and faster. And where large banks have been turning to automation for decades, we’re seeing an increasing number of small to mid-sized institutions taking the same route in the interest of saving time, money and hassle.

Equipment and software management, for example, consume large amounts of time and resources. In fact, PC management alone is a major cost center for banks, where IT team members spend an inordinate amount of time maintaining networks and servers, and managing updates, patches and break-fix issues for end users.

IT automation delivers relief from the administration, monitoring and helpdesk chores that eat up time and resources. IT departments reap immediate time and personnel savings, not to mention reduced licensing fees for software maintenance. Regulatory compliance becomes easier, as do the reporting tasks associated with data, communication and financial reporting that is expected from all financial institutions, regardless of size.

Automation also provides improvements in energy efficiency and security, which in turn lower data center costs. Banks can literally go “green” overnight thanks to the energy savings associated with computer automation.

In this white paper we’ll look at how one community bank went from a largely manual computer system to one that’s handled in a seamless fashion, along the way reaping additional benefits and rewards from its computer automation initiative.

Automation Saves Community Bank Time and Money

In 1898, F.A. Vaniman accomplished a long time goal of opening his own bank when he founded Peoples State Bank. Located in McPherson, Kansas, that bank – now known as Peoples Bank & Trust Company – is still at the same location. Over the last 110 years, the institution has become one of the strongest banks in Kansas. A leader in commercial, small business, and real estate lending, Peoples Bank has over \$300 million in assets and 10 locations in central Kansas.

Managing IT assets, software patches and upgrades across those branches was a challenge for Ziya Gunay, Peoples Bank & Trust’s director of IT. For starters, the institution had multiple dashboards to control its network, security, remote control and other functions. “I was on five different screens at once, trying to switch between the various duties that I had to manage online,” recalled Gunay. “It was time-intensive, and not always easy to track and control.”

Juggling multiple dashboards cut into the bank IT department’s time and impacted its productivity levels. Remote control of user computers (which were located at geographically-dispersed branch locations) was particularly onerous. “We were using the remote desktop software combined with some free Microsoft software to get the job done,” said Gunay. “It took a lot of time, and when I couldn’t fix the problem remotely, I had to get in the car and drive to the location to handle it.”

That time on the road translated into lost hours for Gunay, who was unavailable to deal with other IT issues while in transit, and also while focused on the user’s computer problems. And it wasn’t only user problems that prompted him to get behind the wheel. Many time the trips

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involved simple software patches and software updates. "Overall, we were dealing with a pretty inefficient system that took a lot of time to manage," said Gunay.

In need of an automated system that would provide a wide selection of IT management tools, Peoples Bank & Trust began exploring its options. After considering solutions from three different vendors, the bank selected Kaseya for its robust computer automation platform and centralized data center. "Being a financial institution, we had concerns about data security," said Gunay. "We wanted a product that kept our information in-house."

Other top criteria utilized when selecting Kaseya's solution included a user-friendly interface that could be learned quickly by a wide range of users. Finally, Gunay said the bank was looking for an all-encompassing software package that could also update its third-party programs like Adobe, Flash and Firefox. "We wanted ease and functionality," said Gunay, "and relief from handling updates by hand, on a case-by-case basis."

After wrapping up the selection process, Peoples Bank & Trust kicked off the Kaseya implementation. The project went smoothly, and found Kaseya's experienced engineers walking Gunay and his team through all of the settings and customizations necessary to get the bank up and running quickly. "Implementation took about one week," he said, "and that was followed by a few emails back and forth to get the details worked out."

Now that its IT operations are fully automated, Peoples Bank & Trust is able to keep all of its products up to date at all times, and without human intervention. Security, viruses and patches are no longer at the top of Gunay's daily agendas, since the Kaseya platform handles all of those tasks for him. He knows where all of the bank's assets are at any given time, and can quickly produce reports for internal use, and for external auditors.

"When the FDIC examiners ask about our network and security measures, I can pull up a report within minutes and hand it over to them," said Gunay. "This gives us – and the examiners – peace of mind that we have control of our network, and the proper security measures in place."

Gunay's travel time has been cut down to virtually zero, thanks to the remote desktop functionality included in Kaseya's platform. He's down to a single dashboard, and uses it to quickly take over a user's PC, figure out the problem and solve it quickly – all from his own desk. "My department's ability to fix problems and move onto the next task has improved greatly," said Gunay, who sees computer automation as a necessary step for banks of all sizes. "For us, it has made network management much easier and simpler, and helped us be more productive than ever."

Win-Win Proposition: Computers Managing Computers

Financial institutions that have already embraced computer automation share a common belief that computers are the best possible candidates for managing other computers. Human resources are both capital and labor intensive, and require much time, energy and money to train and motivate. Computers, on the other hand, can be easily programmed to handle the mundane, day-to-day tasks associated with IT management.

For banks, computer automation ensures expansive coverage across all branches and locations, regardless of the institution's size or reach. It is just as germane for a bank with a handful of branches in one state as it is for a national conglomerate with thousands of locations. Whether it is managing a single computer or 100,000 desktops, computer automation does the job well, the first time.

Here are just a few of the benefits that financial institutions are reporting from their investments in computer automation technology:

- Automated maintenance reduces downtime, increases productivity, reduces costs and improves satisfaction, and to a slightly lesser degree, enables companies to reduce IT head count. Automated upgrading/patching and backup bring similar results.

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- Automated performance monitoring increases productivity and improves user satisfaction (according to the survey, this was a key concern for 33 percent of users).
- Automated availability tools—aside from the obvious benefits of improving uptime and productivity—also increase user satisfaction.
- Automated endpoint security makes the bank’s IT infrastructure more secure than manually managed security options.
- Automated maintenance and upgrade/patch increases security levels thanks to the elimination of human intervention, which results in fewer errors and lag time.
- Higher service levels from IT equipment/support staff.
- Improved compliance with regulations.

These results show that automation is delivering impressive benefits, addressing the biggest challenges faced by financial institutions and improving day-to-day operations. It also helps banks achieve two of their most pressing goals for the coming year: learning how to do more with less, and effectively dealing with IT budget cuts.

Computer Automation’s Compelling ROI

According to a survey conducted by Enterprise Management Associates, automation technologies can reduce staffing requirements by 50 percent and reduce complexity, improve response time and decrease the need for “putting out fires.”¹

The study also found that automation reduces the typical repair time for system problems by an average of more than 60 percent. This represents an immediate benefit in terms of staff time and operational cost, and a “softer” benefit in terms of improved productivity and uptime.

IT automation’s value becomes even clearer when calculated based on time and energy savings. If a support technician charges \$75 an hour, for example, and an automation tool reduces the yearly maintenance and repair workload by a conservative 10 hours per device, an office with 100 PCs will save \$75,000 per year. Multiply these savings across an entire organization and it’s easy to see how quickly the ROI will add up.

Automation saves more than just service and repair costs. Daily maintenance such as security updates, patch scans and installations, disk defragmentations, application deployments and network monitoring all take a toll on IT resources—even if it’s just a few minutes per day or hours per week. That time totals up and adds to the savings generated by automation.

Automated power management—where electricity flowing to idle machines is reduced—also generates cost savings while improving energy efficiency. Kilowatt hours of electricity cost from 15 to 20 cents or more, depending on location, and if the power consumption of each device can be adjusted intelligently, companies can realize significant savings on their energy bills and prove they’re operating more “greenly.”

The same is true for reductions in tech support visits. As institutions like Peoples Bank & Trust have already discovered, automation cuts down on “truck rolls” and travel associated with dispatching technicians to service calls across an entire corporation, thus reducing the bank’s carbon footprint and conserving resources. Taking the energy and time savings into account, the average organization recoups its investment in automation software within the first quarter or two of deployment.

Computer automation also helps banks deal effectively with the growing stable of governmental and regulatory regulations. Whether they are complying with regulatory processes and standards, or dealing with departmental “spot checks,” banks that use automation are ensured a much higher level of cooperation. Through automation, banks can complete verifying reports of all compliance activities, and then focus on the exceptions (where the problems existed). All actions and functions are fully accountable, and easily accessed via the platform’s reporting tools.

¹“Data Center Automation: Delivering Fast, Efficient and Reliable IT Services,” October 26, 2007

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Finally, computer automation removes the “human error” factor that banks run into when tasking employees with repeatable, automatic projects that could easily be handled with information technology. Anytime you can remove the human element, and rely instead on a machine to handle those repetitive tasks, accuracy rates rise (and human resources can focus on more important projects).

An Integrated, Comprehensive Solution

When it comes to automation, Kaseya’s tools are the best choice for breadth and depth of services, plus proven success in the field. Regardless of the size of your bank, you can experience the rewards in higher operational productivity and improved service levels through IT automation.

By implementing a comprehensive and integrated solution with the power, flexibility and scalability to meet your needs today and expand as your institution grows, IT automation enables a proactive approach to improved operations and end user satisfaction.

From software inventory to remote desktop management, Kaseya provides the tools, technology and resources that make complete IT automation possible.

Our tools are:

- **Easy to learn and easy to use:** One integrated and consistent web-based interface simplifies the learning curve. Schedule backups, software updates, Antivirus updates and more using a consistent automation platform that simplifies IT service delivery.
- **Fast and flexible to deploy:** Modular deployment puts you in control. Start with remote control, systems management, backup and disaster recovery, antivirus, audit, discovery, monitoring or patch management, across your entire network infrastructure.
- **Affordable:** We offer prices that are very sensitive to the buying needs of corporate IT leaders and our on-premises or SaaS solutions offer banks the licensing and deployment flexibility they need.

With remote IT capabilities, central management and automation of routine tasks, Kaseya eliminates the need for additional resources, allowing you to do much more with less.

Using our solution, your financial institution will:

- **Save time and money while conserving energy.** Save license fees and power consumption and reduce the number of on-site visits. Do it all remotely so you don’t need to travel to fix a problem. Reduce your carbon footprint while improving IT service.
- **Increase end user satisfaction.** Implement a proactive (instead of reactive) service delivery model, and systems run more smoothly, with less downtime, providing you with more time to focus on strategic initiatives.
- **Increase security levels.** IT automation helps ensure your systems are in compliance with applicable regulations and requirements. They perform better and are more secure.

Kaseya delivers a comprehensive IT automation solution that helps IT managers run entire networks smoothly from one central location. With a powerful, easy to use, web-based platform, Kaseya simplifies delivery of IT services—saving time and money and making systems secure.

The Kaseya IT Automation solution incorporates:

- Automated Systems Management
- Audit and Inventory
- Monitoring
- Service Desk
- Patch and Upgrade Management
- Software Deployment
- IT Management Reporting and Dashboards

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- Antivirus and Antimalware
- Desktop Policy Management
- Backup and Disaster Recovery
- Regulatory Compliance

In addition, using Kaseya's tools to automate routine IT tasks helps banks reduce their energy consumption—which conforms with "green computing" initiatives and adds money to the bottom line. Kaseya Desktop Policy Management enables IT professionals to implement out-of-band power management—limiting the electricity flowing to non-essential or idle computing resources, for example—without compromising system management capabilities.

Providing Comprehensive Support

By automating IT processes and delivering comprehensive remote support capabilities, Kaseya lets financial institutions leverage all the benefits of automation and operate more efficiently and securely every day.

If you're not on the IT automation bandwagon yet, now is the time to hop aboard. As one IT director phrased it, "I used to be in the dark ages, but thanks to automation, I now see the light."

We couldn't sum it up any better if we tried.

Contact Kaseya Today

Remote access and remote control needs to be integrated within a single management framework, allowing you to conduct powerful maintenance on distributed machines without putting the corporation at risk and without disrupting users. Kaseya provides this level of integration, consolidating remote management on a single pane of glass.

Contact Kaseya today for more information and to request a live demo of our powerful IT Systems Management solution.

About Kaseya

Kaseya is the leading global provider of IT Systems Management software. Kaseya solutions empower virtually everyone — from individual consumers to large corporations and IT service providers — to proactively monitor, manage and control IT assets remotely, easily and efficiently from one integrated Web-based platform.

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