



SUCCESS STORY: FINANCIAL SERVICES

Private Investment Firm Moves to the Cloud with IGEL and Microsoft

Global COVID-19 pandemic accelerates transition that began in preparation for the company's headquarters relocation.



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SUMMARY

The Challenge

- Despite company headquarters relocating, a number of key executives, including the CEO, would be working from home offices. This was driving the need for secure, remote access to workspaces.
- The global COVID-19 pandemic and safer-at-home restrictions drove the rapid adoption of a company-wide work-from-home strategy and accelerated the company's move to the cloud.

The Solution

- IGEL OS
- IGEL Universal Management Suite
- IGEL UD3 and IGEL UD7
- Microsoft Windows Virtual Desktop (WVD)

Key Benefits

- Secure access to cloud workspaces
- Seamless user experience regardless of location
- Ease of management

In Q2 of 2019, a private investment firm made the decision to move to the cloud in advance of a planned relocation of its corporate headquarters from the northeast U.S. tri-state region to the southeast. Many of the company's top executives were not planning to relocate with the company, and would be traveling back and forth between the new headquarters and their home offices.

As part of the planned move to the cloud, the company selected Microsoft Windows Virtual Desktop (WVD), as they found it to be the best solution for driving a seamless and secure end user computing (EUC) experience, regardless of where their executives and employees were working. "With some of our end-users going remote, we didn't want the complexity associated with managing Windows OS at the desktop level," said the firm's CIO.

Previous to the decision to move to WVD, the company had been working with Dell Wyse and understood the thin client computing model. "To support WVD, we needed to find a new thin client solution," said the CIO. "One of our solution provider partners suggested IGEL and we knew that they had been actively working with Microsoft to certify and validate their OS for WVD access. They were ahead of the game when compared to other providers, who weren't able to commit to a timeframe for supporting WVD."

The investment firm downloaded a trial of IGEL OS and set up the IGEL Universal Management Suite (UMS). "It worked surprisingly well, even on our non-IGEL hardware and we made the decision to move forward in purchasing both the IGEL hardware and software to support our WVD deployment," said the CIO.

In November 2019, IGEL announced that it was the first Linux-based OS validated and certified with Microsoft for WVD access. "At that point, all systems were go and we began procuring and staging everything we would need to have on hand to make the switch to WVD in early 2020."

GLOBAL PANDEMIC FAST TRACKS CLOUD WORKSPACE DEVELOPMENT

Little did the private investment firm know that in March 2020, the world would be turned upside down as COVID-19 spread rapidly across the globe. "We were planning for one major event, the relocation of our headquarters, and something totally different happened," said the CIO.

Up until the pandemic hit, the CIO had been focused on shutting down the firm's offices and ensuring that the pieces were in place to begin operations at the new headquarters location. "I was having everything sent there including the IGEL hardware, keyboards and peripherals, monitors, printers and phones," he added. "All of the orders had to be released and equipment redirected to our executives at their homes. I then spent several days traveling around the tri-state area setting up workstations for our executives including our CEO, CFO and general counsel."

One of the biggest hurdles was that the firm had trialed the IGEL and Microsoft WVD solution within the office environment, but not from a home office. "We really bet the farm," said the CIO. "However, as we began to realize that it might be weeks, if not months, until workers were allowed back into the office, we had to prioritize the work-from-home environment. It was a little nerve-racking not knowing if the solution would actually work."

Fortunately, everything worked, and one of the most surprising outcomes for the CIO was how impressed the executive management team was with their home office set-ups. **"The day I set up our CEO's home office with an IGEL UD7 supporting three monitors, Microsoft WVD, and a Cisco phone, it was amazing. He was so excited to see what we were able to accomplish and now he has a whole new appreciation for IT."**

LESSONS LEARNED AND SUCCESS ACHIEVED

While no solution is perfect right out the gate, in the end IGEL and Microsoft WVD quickly proved to be a winning combination for the firm.

“Even though we didn’t plan the rapid migration of our entire firm to remote offices, we were successful in getting everyone working from home almost immediately with IGEL and Microsoft. We could not have hoped for a better outcome,” said the CIO.

The firm’s CIO also attributes his success to working with the right partners to execute the right solution for supporting remote work.

Currently, the private investment firm has 60 employees leveraging IGEL OS to access their Microsoft WVD workspaces via laptops, desktops and IGEL hardware. Once workers begin to return to the office, they will be using IGEL UD3 and UD7 endpoint devices on-site. “Our executives will continue to work from home with their IGEL hardware,” added the CIO, “And, the entire IGEL and WVD infrastructure will continue to be managed through the IGEL UMS over Cisco Meraki SD-WAN.”

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