



FINANCIAL SERVICES COMPANY

“People want all-the-time, reliable access to their accounts. We can’t compete without a top-notch, durable ADN infrastructure, and F5 has provided us with just that.”

IT Manager at a large financial services company

Financial Services Company Boosts Customer Experience for Higher Competitive Advantage

A Fortune 100 financial services company that provides investment and retirement services to millions of customers experienced network outages that resulted in unacceptable service interruptions. The company needed to improve the reliability of its website to ensure that customers have consistent access to its online suite of products and services.

The financial organization implemented an Application Delivery Networking (ADN) solution from F5. Using F5 devices, the organization can maintain website availability and continue to provide the high level of customer service that it is known for—a critical requirement in today’s highly competitive industry of financial services.

Business Challenges

The financial organization is the leading retirement system for people in the academic, research, medical, and cultural fields. The company serves 3.7 million active and retired employees. For nearly 100 years, the company has prided itself on serving those who serve others.

Although the financial organization is the leader in its service area, it faces stiff competition from other investment firms. To distinguish itself from the competition, the financial organization’s focus on customer service is vitally important.

In late 2009, the financial organization experienced a system outage that limited access to its public website. The outage was caused by a failure of the company’s vendor load balancing infrastructure. As a consequence of the outage, thousands of customers were unable to access their quarterly account statements.

Nearly a decade ago, the financial organization had also implemented several traffic management devices from F5. These aging devices were designated to be replaced by the current vendor’s equipment,

Overview

Industry

Financial Services

Challenges

- Improve website availability
- Flexibly redirect customers among servers and data centers

Solution

- BIG-IP® Local Traffic Manager™
- BIG-IP® Global Traffic Manager™
- BIG-IP® Application Security Manager™
- F5® iRules®

Benefits

- Consistent website availability for better customer service
- Reliable ADN infrastructure for increased competitive advantage

but before the replacement occurred, one F5 device ran out of memory. This also resulted in an interruption to website service, but an F5 Professional Services team acted quickly to correct the problem.

“Even though their device was being phased out, and it should have been replaced long ago, F5 corrected the situation immediately. They really came to our aid in a crisis,” said the IT Manager at the organization.

After these harrowing outages, the financial organization executive management made it a top priority to implement a bullet-proof infrastructure, one that could ensure the company’s ability to live up to its reputation for diligent, reliable customer service.

Solution

For many years, the financial organization has relied on IBM to design, build, and maintain key aspects of its network infrastructure. When the vendor solution failed, IBM suggested a strategic redesign, and it recommended that the financial organization replace its current vendor devices with an Application Delivery Networking (ADN) solution from F5.

“After consulting with IBM, we understood that an F5 solution would enhance our ability to deliver excellent customer service,” the IT Manager explained. “We had already been won over by their service,” the IT Manager added.

F5 worked with IBM to design an ADN infrastructure for the financial organization that involved replacing its current vendor appliances and third-party application security technology. The financial organization chose BIG-IP Local Traffic Manager (LTM) to intelligently manage traffic among the company’s web and application servers. These servers support the full suite of the financial organization’s

online investment services, provide access to mutual fund research, connect customers with financial advisors, enable customer account transactions, and more.

The company also chose BIG-IP Application Security Manager (ASM) to protect its applications from Internet security threats. BIG-IP ASM is an advanced web application firewall that reduces and mitigates the risk of loss or damage to data, intellectual property, and web applications. It also provides the financial organization with advanced monitoring and centralized reporting, and it eases compliance with regulatory mandates.

Further, F5 iRules, a customizable scripting language, enables the company to monitor its enterprise applications, including IBM WebSphere, IBM WebSphere DataPower, a Seibel customer relationship management application, and applications running on the company’s Omni mainframe. The financial organization also chose BIG-IP Global Traffic Manager (GTM) to manage traffic among its three data centers. The company plans to have its ADN solution fully implemented by mid-2011.

Benefits

With products from F5, including BIG-IP LTM, BIG-IP GTM, BIG-IP ASM, and iRules, the financial organization is able to ensure that its customers can access their retirement account information and conduct financial transactions easily. Website availability has improved, and service interruptions are minimized.

Better customer experience

The previous service interruptions were caused by an inflexible load balancing infrastructure. With an ADN environment from F5, service interruptions have been greatly minimized. Using customized

iRules, the IT department can monitor the company’s enterprise applications and other services, and it can intercept and manipulate the data that these applications deliver to customers.

“For instance,” the IT Manager explained, “if one of our WebSphere servers is unavailable, an iRule can detect that issue and redirect customers to another server or data center. Customers will not see server errors or experience service interruptions due to the flexibility we have with iRules and the BIG-IP devices.”

Higher competitive advantage

The financial organization is faced with stiff competition from investment firms, mutual fund groups, insurance companies, and other 401K retirement savings plan companies. For many years, the financial organization has distinguished itself with its high level of customer service.

With the F5 solution in place, the financial organization can provide customers with a comprehensive suite of online investment products and services, commensurate with and often exceeding its competitors’ offerings.

“If our website is down and if our services aren’t available, this can encourage our customers to take their business elsewhere,” the IT Manager said. “People want all-the-time, reliable access to their accounts. We can’t compete without a top-notch, durable ADN infrastructure, and F5 has provided us with just that.”

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