



Investment Management Firm Lifts and Shifts Applications and Virtual Desktops to Microsoft Azure with Teradici Cloud Access Software

“Teradici Cloud Access Software was super easy to set up—it just worked. And not having to rewrite our applications for the cloud enabled us to make the transition before our planned data center shut down. We couldn’t have done it with any other solution.”

CHIEF TECHNOLOGY OFFICER
MID-SIZED INVESTMENT MANAGEMENT FIRM

This Boston-based mid-sized investment management firm is a pioneer in endowment-style investment management for institutions and private investors. Founded in 2004, the company has 45 employees and more than \$3 billion in assets under management.

AT A GLANCE

Challenges

- Eliminate large IT infrastructure upgrade costs every 3-4 years
- Understand infrastructure costs by project and person
- Migrate applications to the cloud without modifications
- Continue using existing Dell Wyse PCoIP Zero Clients
- Automate infrastructure and desktop management

Solution

- Lifted and shifted applications and virtual desktops to Microsoft Azure using Teradici Cloud Access Software
- Continued using existing Dell Wyse PCoIP Zero Clients
- Automated management of remote desktops and connections with Teradici Cloud Access Manager

Results

- Converted infrastructure costs to a predictable monthly expense
- Made infrastructure costs transparent
- Moved applications to cloud without modifications, saving an estimated 340 hours on testing
- Reduced time spent on infrastructure management
- Matched or exceeded previous application experience



At this firm, investment professionals count on fast, reliable desktop performance to manage relationships, identify trends and opportunities, and even stream TV for breaking news that could affect the market. “We’re constantly looking to see where technology is going—and then try to arrive there faster than our peers,” says their Chief Technology Officer.

The firm wanted to make IT costs more predictable.

Approximately 200 VMware Horizon virtual machines lived on 19 servers in a collocation center and were replicated to a similar setup in a back-up facility. The investment management firm’s leaders liked the user experience—but not the economics. Every 3-4 years the firm faced a large capital outlay for new servers and storage. Maintaining infrastructure in two data centers required three full-time staffers. And the team had to guess at infrastructure costs per project or person. “We wanted cost transparency,” says their CTO.

The firm decided to move applications and desktops to the cloud.

Cloud computing converts infrastructure from a capital expense to a predictable monthly operational expense. What’s more, the IT team could see the monthly cost of each server, file share, or virtual desktop and allocate that cost to the right department.

After evaluating leading cloud solutions, the firm chose Microsoft Azure with Teradici Cloud Access Software. Teradici’s software outperformed the other solutions on video speed and quality. The firm could continue using its existing Dell Wyse PCoIP Zero Clients, keyboards, and monitors, saving money. “We already trusted the Teradici PCoIP protocol because it powers VMware Horizon,” says their CTO. “And of all the providers we looked at, Teradici seemed to have the best service.”

Teradici Cloud Access Software also helps the firm comply with the industry’s stringent security requirements. That’s because the software uses the Teradici PCoIP protocol, so client data never leaves the cloud. Only encrypted pixels travel over the network.

The firm lifted and shifted its applications from the data center to Azure with “no changes whatsoever,” says the firm’s systems engineer. “We had zero application issues.” In contrast, the other solutions the firm considered would have required the IT team to change how it deploys desktops and applications. “By letting us move applications without changing them, Teradici’s solution saved us a lot of testing—at least a month of work for two people,” says their systems engineer. That’s 340 hours.

To shift the virtual desktop infrastructure (VDI) to Azure, the IT team migrated a few Windows virtual desktops each day for a month. Staff didn’t notice any difference: application performance remained fast and reliable. In fact, certain applications, including Microsoft Exchange Online, perform faster in the cloud than they did in the on-premises data center.

Employees often log into their virtual desktops from a laptop at clients’ offices or from home. “Teradici Cloud Access Software is part of our business continuity plan,” says their CTO.



Products used

Teradici Cloud Access Software

Dell Wyse PCoIP Zero Clients

Virtualization platform

Microsoft Azure

Now IT expenses are more predictable. “We’ve converted a large capital outlay every three or four years to a monthly operational expense, and I can see the precise infrastructure costs for a project,” says their CTO. Managers who want to hire a new team member can now see the desktop costs associated with the position.

Management takes less time. It includes Teradici Cloud Access Manager for automating desktop management tasks like provisioning and brokering connections. “Teradici Cloud Access Manager is just what I was looking for: a simple management interface for everything I do in Azure,” says their systems engineer. Cloud Access Manager automatically shuts down virtual machines when they’re not in use, and she plans to automate the tedious manual process of assigning users to specific virtual machines.

Their CTO concludes, “Teradici Cloud Access Software was super easy to set up—it just worked. And not having to rewrite our applications for the cloud enabled us to make the transition before our planned data center shut down. We couldn’t have done it with any other solution.”

