



INDUSTRY

Financials / Asset Management

LOCATION

Pennsylvania

CHALLENGES

Lincoln Investment needed

- To double revenue and assets under management
- A solution that would easily integrate with their ShoreTel voice environment
- To migrate from its current environment to SD-WAN without interrupting traffic

RESULTS

- Significant cost savings
- State of the art cybersecurity
- Simplified management of network architecture

Lincoln Investment Expands Its Business Using SD-WAN

As one of the top independent brokers/dealers in the financial services space, Lincoln Investment understands the competitive nature of its business sector. With a goal to double both their revenue and assets under management, it became obvious that technology needed to play a big role in reaching those benchmarks. Since IT remains an important competitive differentiator in the finance world, Lincoln had to embrace the state of the art to ultimately achieve those goals.

Looking for an industry-leading solution for their growing telecommunications needs, they turned to the innovative VMware SD-WAN™ by VeloCloud®. VMware had proven themselves as a solution that understands and supports the technology modernization demands of companies like Slack, Zendesk, and OneLogin. Dell EMC further supported this reputation by recently announcing a collaboration with VMware to modernize networks across the edge, core, and cloud by combining software-defined wide area network (SD-WAN) with a data center fabric orchestration platform.

With the help of leading authorized partner, CPI Telecom, Lincoln Investment seamlessly migrated its current network to the VMware SD-WAN without disruption to existing traffic. They now boast a future-proof, scalable enterprise network able to support their goals for exponential growth.

Here is a more detailed look at how the VMware SD-WAN solution is a game-changer for a leading financial services firm executing their plans for massive expansion. Leverage these insights to understand how VMware SD-WAN can help you transform your own organization.

SD-WAN fits within Lincoln Investment's current network infrastructure

The current Lincoln Investment network includes 11 branches, as well as a few on-premises data centers. Their networking strategy also embraces the cloud, but only in a hybrid fashion. The critical nature of their clients' personal financial records warrants this partial on-premises approach focused on privacy and data security.

When Lincoln Investment turned to CPI Telecom to help solve their telecommunications needs, they made sure VMware SD-WAN's overlay architecture would fit seamlessly on top of any existing network infrastructure and would cause no network traffic disruptions. CPI Telecom's network team continues to incrementally convert each branch to the new solution, gradually replacing older Multiprotocol Label Switching (MPLS) circuits in the process. As a Mitel Gold Member and Master SD-WAN provider with over 20 years of telecom experience, one of the reasons CPI Telecom chose VMware involved the easy integration with Lincoln's Mitel Connect voice environment.

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ADAM LION
NETWORK ENGINEER, LINCOLN INVESTMENT

As noted earlier, no disruption of existing network traffic occurred due to the VMware SD-WAN migration. The company installed the VMware SD-WAN components in two data centers and one branch site, with the latter serving as a template for the rest of the implementation. Importantly, the company’s existing applications, including email, voice, web-based service apps, and more, all remained online throughout the migration process.

When taking into account Lincoln’s home office locations, a similar story gets repeated. These locations use a host of specialized applications that use VMware SD-WAN with nary an issue during and after migration. Essentially, the company’s network infrastructure became future-proof in a fashion transparent to its users.

The significant cost savings provided by VMware SD-WAN

In addition to its other myriad of benefits, VMware SD-WAN provides companies with significant cost savings—an important factor in a competitive business world. Lincoln Investment noted this at their locations with multiple links using both MPLS and broadband. In fact, these cost savings were a leading factor in choosing the VMware SD-WAN solution.

Because of their VMware SD-WAN implementation, Lincoln is able to inexpensively aggregate bandwidth. This approach ensures extra capacity is available in the event of a network failure. They maintain at least two connections into each site for this purpose. The extra capacity also supports the company’s goals for rapid growth.

Once the VMware SD-WAN migration is complete, Lincoln Investment plans on removing any MPLS circuits still remaining. In addition to some final cost savings, being a 100 percent SD-WAN shop truly prepares the company for additional expansion.

According to Lincoln Investment, they are ultimately able to save 74 percent on telecom expenses by implementing VMware SD-WAN. It’s a tech innovation “that’s more redundant, more cost-effective, and by no way, shape or means less effective than MPLS,” says network engineer, Adam Lion. Remember, the financial industry is one that’s very cost conscious. Using a newer networking technology that’s actually cheaper and more beneficial for their operations and growth potential is simply smart business.

VMware SD-WAN provides state of the art cybersecurity

The VMware SD-WAN solution easily integrates with many of the leading-edge cybersecurity products currently on the market, like a tool from Barracuda for email filtering. As part of their VMware SD-WAN implementation, Lincoln Investment is also preparing to roll out VMware Workspace ONE as an identity provider, which includes multifactor authentication across their entire network.

A VMware SD-WAN approach offers multiple options for securing a network. A firewall embedded into a VMware SD-WAN network component is one example. If necessary, all Internet traffic is able to be backhauled into a data center hosting this firewall.

Additionally, companies can choose a Cloud Access Security Broker (CASB). Rest assured that VMware SD-WAN supports the latest encryption algorithms and cybersecurity protocols. Considering the massive importance of data privacy in the financial world, Lincoln Investment gains peace of mind that their customer information is protected with VMware.

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Simplifying the management of network architecture

The VMware SD-WAN solution includes the VMware SD-WAN Orchestrator component, which provides management and monitoring functionality usually from a centralized location. Lincoln Investment uses a third-party telecom service company to help manage their emerging SD-WAN network and CPI Telecom provides 24/7 onsite support and a network operations center that proactively monitors and manages Lincoln’s network architecture. The VMware SD-WAN Orchestrator simplifies this support model, letting CPI Telecom monitor for outages and report any issues to Lincoln and the telecom provider if necessary.

This flexibility provided by the VMware SD-WAN Orchestrator facilitates any network management scenario. In short, it gives Lincoln whatever option best suits their needs. Internal management, shared management with a third-party service provider, or even management using a cloud-based service offered by VMware are all possible.

Having the VMware SD-WAN Orchestrator is especially useful for Lincoln Investment during the rollout of their VMware SD-WAN solution. Their Internal network engineers are able to use the tool for monitoring and to also gain a deeper understanding of their new network. “This was a great side feature that we weren’t expecting—receiving real time stats of the connections in all of these branches,” comments Adam Lion.

Of course, this simplified network management also helps the company save costs moving forward.

Future-Proofing the Lincoln Investment network infrastructure

VMware SD-WAN dovetails nicely with Lincoln Investment’s strategy to reduce their dependence on IT hardware. It’s the right network platform for a company already moving its technical assets to a cloud-based environment. Future-proofing its network infrastructure remains a key piece of any strategy for exponential growth in the financial industry.

Additionally, they are currently in the process of migrating to Microsoft SharePoint and Office 365, two important business applications that thrive in a cloud environment enhanced by VMware SD-WAN. Their branch offices benefit from a more stable and secure Internet connection; improving application performance as a result.

VMware SD-WAN gives Lincoln the flexibility to implement their new network infrastructure in a gradual manner. This ensures minimal disruption to daily operations while gaining the platform and bandwidth to support hyperscale future growth. For example, some branches are still able to use their on-premises voice systems, while others successfully transition into a cloud-based VoIP service.

Ultimately, Lincoln Investment’s goal to become a top ten company in the competitive independent broker/dealer space is achievable because of their belief in the promise of VMware SD-WAN. Partnering with a networking leader like VMware and using their innovative solution provides the feature set and post-sales support to ensure their migration is successful.

However, cost savings matter, especially in the financial industry. Lincoln Investment is saving 74 percent on telecom expenses due to their new networking platform. In the end, VMware SD-WAN is truly the way to take their company to another level.

For more information on VMware SD-WAN, please visit <https://www.velocloud.com/> or contact your VMware representative.

