Exceptional customer interactions result in satisfied customers and long-term engagements. Yet meeting customer expectations can prove difficult—and costly—if frontline employees cannot access critical client data or financial services applications because the data center or their desktop is down. As financial services firms look for ways to increase both customer and employee satisfaction, many want to adopt bring-your-own-device (BYOD) policies that support the constant influx of new mobile devices. However, implementing a BYOD strategy requires IT to confront a whole new set of challenges involving data protection and compliance.

By virtualizing employee desktops and hosting them in a private cloud, the VMware AlwaysOn Workplace solution enables financial services organizations to empower employees. It delivers access to everyday workspaces that is as consistent and reliable for personnel in the field as for employees working in the office. Tested and validated, the AlwaysOn Workplace solution provides around-the-clock access to digitized information and applications—anytime, anywhere, and more important than ever, from any device. Yet although the solution gives employees more freedom, it also keeps IT in control.

The AlwaysOn Workplace solution is centrally managed by IT, enabling financial services organizations to meet all of the regulatory and compliance requirements for protecting sensitive client information. Additional device encryption solutions are not needed, because sensitive data never leaves the data center and nothing is ever stored on an end user’s local device. IT can easily apply security policies to individual users or groups of users, helping to keep the solution—and the organization—in compliance. With the AlwaysOn Workplace solution, IT can now begin to manage end-user identities and stop managing devices.

Drive Results with AlwaysOn Desktops

Whether employees are in the office, at home, or on the road—getting prepared or engaging with a client—they don’t want to think about technology. They just want it to work. Every time. With built-in availability, resiliency, reliability, security and mobility capabilities, the AlwaysOn Workplace solution ensures that employees can access what they need—when they need it—so clients get results.

- **High availability for nonstop service** – In front of customers, every second matters. That’s why the AlwaysOn Workplace solution provides multiple levels of redundancy with no single point of failure. No matter what, it helps to ensure that a workspace is always available.
- **Complete resiliency and reliability** – Even if a primary site fails or is compromised by a natural disaster or other unplanned event, employees can still access all of the resources they require to do their jobs. Through constant load balancing and monitoring, the AlwaysOn Workplace solution routes users to appropriate sites, and in the event of an outage, enables them to resume customer interactions in seconds.
VMware AlwaysOn Workplace Solution
for Financial Services

Continuous mobility for more personalized interactions – Field personnel want to choose the device that best fits their jobs and their personal work styles, but IT needs to maintain control. The AlwaysOn Workplace solution supports both requirements. Using virtualization to provide cloud-based workspaces, it untethers personnel so that a user’s desktop or workspaces are tied to that user’s identity, enabling that user to access data and applications on the latest mobile devices—from iPad tablets to smartphones to conventional laptops and PCs. And users can access what they need over wireless and wired networks.

At the same time, because managing disparate identities across the organization and tying them to appropriate access requirements remains a challenge, the AlwaysOn Workplace solution features policy-driven control and identity-based access. It enables IT to set policies or restrict access for specific users or groups of users. For example, IT can allow certain advisors or agents to access financials or policies in particular regions while preventing others outside those regions from viewing them. This granular level of control satisfies the needs of both employees and IT.

Robust security to protect sensitive data and stay in compliance – Even though they are regulated, compliance processes do not have to be difficult. The AlwaysOn Workplace solution improves workflows and enables frontline employees to spend more time with clients. Employees’ mobile workspaces follow them from device to device or from the office to the field—seamlessly.

The AlwaysOn Workplace solution secures virtual endpoints, helping organizations meet compliance requirements to keep sensitive client data private. All information is stored in the data center, so no confidential data is left on tablets, smartphones, laptops or PCs, which can easily be stolen. The solution also supports continuous compliance monitoring capabilities that result in reports and dashboards for unified compliance reporting. This reporting may be related to and required, for example, by government mandates such as the Sarbanes-Oxley Act and organizations such as the Payment Card Industry (PCI) Security Standards Council.

Improve IT Control and End-User Satisfaction

With cloud-based workspaces, organizations can help accelerate the automation of financial services IT and the delivery of end-user computing as a robust service from the data center. The AlwaysOn Workplace solution leverages the power of the industry-leading VMware vSphere® virtualization platform to create a highly manageable, flexible and efficient environment to host cloud-based, always-available desktops.

The AlwaysOn Workplace solution makes employees more productive and drives deeper client relationships, because personnel are no longer tied to traditional PCs and they can securely access their workspaces from any device—at any time. The AlwaysOn Workplace solution gives employees on the front lines 24/7 access to all of the applications and the most current data they need to do their jobs, resulting in improved collaboration, better results and more satisfied customers.

“One of the benefits that we’re seeing from our virtual desktop deployment is now we have high availability and disaster recovery/business continuance capabilities at the desktop level. Obviously, with thick PCs, if a building went down, you’d have to replace all of those PCs. Now with a host-based, SAN-based desktop solution, it’s very easy to replicate that environment between data centers and that’s exactly what we do. That’s a really big improvement over what we had with the thick PCs.”

— Chris Green, Vice President, IT Infrastructure Systems, Washington Trust Bank
A complete cloud-based AlwaysOn Workplace for financial services, which can be designed from a proven reference architecture (see Figure 1), includes the following components:

- **Virtual desktop infrastructure** – The industry-leading virtual desktop infrastructure (VDI) solution, VMware Horizon View™ is the foundation of the AlwaysOn Workplace solution. By virtualizing workspaces and hosting them in a private cloud, IT can easily manage desktops or pools of desktops from a central location and keep all data secure in the data center. Customers worldwide trust their desktop infrastructure to Horizon View. Learn more at http://www.vmware.com/products/view.

- **Virtualization and management platform** – Horizon View includes vSphere and VMware vCenter™ Operations Manager for Horizon View, which extend the enterprise benefits and high-availability features of vSphere and vCenter Operations to desktops. This is the same virtualization platform used by Fortune 100 companies. Learn more at http://www.vmware.com/products/vsphere.


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“VMware View lets our employees use any device they want to access their desktops and yet stay in compliance with all the regulations by keeping all the data in the data center.”

— Joe Blank, Lead Systems Administrator, Blue Cross and Blue Shield of Kansas City
“Our employees love using their iPads to access their desktops from anywhere and are increasingly adopting them instead of using laptops or desktops.”

— Brian Vincik, Senior Systems Administrator, Blue Cross and Blue Shield of Kansas City

Replication software – Replication between two sites (Horizon View pods) is critical to the AlwaysOn Workplace solution’s high-availability functionality. Many replication software options—from file- to block-level replication—can be used for this purpose. The solution architecture uses both master-image replication and replication for user and profile data.

Application delivery controller and load balancer – Application delivery controllers (ADCs) are critical components in the AlwaysOn desktop design. In addition to standard load balancing, ADCs provide intelligent routing based on source IP addresses, geolocation or latency. This helps to ensure that users are always routed to their preferred site and to their desktop session. If a site failure occurs, the ADC enables the connection to be routed to the next available site.

(Optional) Management – When an environment is spread across two sites, streamlined management and a single-pane dashboard become an IT necessity. vCenter Operations for Horizon View provides the management and dashboard functionality required at each site for IT to efficiently and seamlessly manage. Learn more at http://www.vmware.com/products/desktop_virtualization/vcenter-operations-manager-view/overview.html.

Contact VMware to Empower Your Staff

The old adage “If you don’t take care of your customers, someone else will” is particularly relevant today as financial firms face increasing pressure to meet continuously changing regulatory requirements and competitive threats. With the AlwaysOn Workplace solution from VMware, financial service organizations can enable high-touch customer experiences with every interaction—whenever and wherever clients need them.

Contact VMware today to learn more about how the AlwaysOn Workplace solution is built and validated, or to get your free assessment. Our experts are here to help your organization journey to nonstop access on your way to greater profitability.

For more information or to purchase VMware products, call 877-4VMWARE (outside North America, +1-650-427-5000), visit http://www.vmware.com/products or search online for an authorized reseller.