



The Carlyle Group Modernizes its Office and User File Experience with CTERA

THE CARLYLE GROUP

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Jeff Pisano, Vice President of IT, The Carlyle Group

Highlights

- World’s largest private equity firm overhauls legacy Windows File Server infrastructure with CTERA Cloud Storage Gateways and Enterprise File Sync and Share to enable “always-on” file access for globally distributed offices and users
- Enables instant business continuity for regional offices worldwide
- Realizes immediate RoI by eliminating legacy backup processes and services
- Eliminates silos of systems administration and globalizes data through CTERA’s centrally managed Storage-as-a-Service platform

Company Background

The Carlyle Group is the largest private equity and alternative investment firm in the world. It currently operates with more than 1,700 professionals across 35 offices, and its portfolio companies employ more than 675,000 people worldwide. The Carlyle Group specializes in four key business areas: corporate private equity, real assets, global market strategies, and investment solutions.

The Challenge

In dozens of locations around the world, Carlyle deployed legacy file servers to provide file access for 10s-100s of users in each office. Each filer contained business-critical files and spreadsheets used by Carlyle’s partners and employees. While analyzing the organization’s business continuity agenda, Carlyle recognized that data redundancy for these servers was absent; if an office’s file server went down – as had recently occurred in Carlyle’s Tokyo and Washington D.C. offices following natural disasters – users lost access to their files, and productivity was severely impacted during the time it took to set up a replacement server.

To solve this problem, Jeff Pisano (Vice President of IT at The Carlyle Group) sought a cloud-enabled solution that would provide fast local file access for users and ensure their files would always be available from anywhere, even in the case of a network outage. The solution also needed to meet the strict security and privacy requirements of a global financial services company.



The CTERA Solution

CTERA's Enterprise File Services Platform was the only solution to solve Carlyle's business challenges, meet its IT requirements and conform to its IT security mandate. In choosing CTERA, Carlyle now leverages a single platform for:

- NAS home directory and network file share access at regional offices
- File-based collaboration for mobile users around the world
- Built-in disaster recovery tools and hybrid cloud backup of files

It starts at the regional offices, where Carlyle has deployed CTERA cloud storage gateways across dozens of locations across six continents and 22 countries - from the U.S. to South Africa to Singapore. The CTERA gateways provide local NAS storage to replace Carlyle's expensive legacy filers, and include built-in backup software to eliminate the need for Carlyle's previous offsite backup processes. Gateway file backups are automatically snapshotted, globally de-duplicated, compressed and stored in Carlyle's virtual private cloud (VPC) hosted on Amazon Web Services (AWS).

The CTERA platform also includes CTERA Enterprise File Sync and Share (EFSS), enabling secure anytime, anywhere mobile and browser-based file access for Carlyle's 1,700 users around the world. CTERA's file sync capabilities extend to the office gateways as well to provide full file management consistency across all access points, regardless where the user is storing or accessing their data.

The gateway syncs mapped drives back and forth via Carlyle's private cloud to provide a "follow me data" experience for users. Files and projects are seamlessly synchronized from the CTERA office gateway to laptops and mobile devices for roaming users unable to access files through an office LAN. With the data silos from Windows file servers removed, Carlyle is providing modern and secure productivity tools to end-users, while preserving the local office storage experience and local data persistence to mitigate network bottlenecks that typically plague cloud-based SaaS file services.

Additionally, Pisano and the Carlyle IT team can decide which files are synced to which office to enable local access to various users. Users in Charlotte and in San Francisco, for example, can access and collaborate on the latest versions of files via the office gateway. CTERA's sync engine ensures file changes are consolidated and consistent across all access points, while also providing access to previous versions of files to prevent accidental data loss.

Above all else, file access for a leader in private equity must remain completely secure and private. The CTERA solution architecture uniquely met Carlyle's requirements in this regard as well. After rigorous audits of the CTERA solution, Carlyle's security and IT teams determined that CTERA provided all of the



benefits of a modern file management system without any of the security compromises that come from storing files in a shared cloud service.

CTERA allows Carlyle to deploy the platform as a private cloud SaaS solution that Carlyle uniquely owns and operates within the VPC on AWS. With CTERA, Carlyle completely owns all of its data, authentication tools and encryption keys to resolve any security concerns. Additionally, CTERA's source-based encryption and multi-tenancy enables Carlyle to geographically segment encryption domains and minimize the risk to the broader organization in the unlikely event that a remote office is hacked.

"We researched a long list of competitors, and CTERA's security was the best," Pisano says.

From a disaster recovery standpoint, Pisano sees tremendous value in the CTERA solution. Previously, when a file server in a remote office went down, a replacement server could take as long as a week to be fully operational. Today, if a gateway fails, local user machines can be automatically re-mapped via a WebDAV mount to Carlyle's AWS VPC. File access looks the same to the user, and the office remains productive.

Carlyle also gains significant cost savings over its previous architecture. In fact, the cost of the CTERA solution was less than the annual maintenance cost of Carlyle's previous distributed NAS solution.

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