



## Case Study Lifeplan

# Lifeplan Funds Management automates compliance with Tivoli Storage Manager

### About LifePlan

Lifeplan is a retail funds management organisation, with assets and funds under management in excess of \$1.6Bn, operating in specific niche markets and holding market leadership positions in the investment bond, prepaid funeral bond, and education savings/investment funds markets.

Lifeplan is placed in the Top 20 of the “Retail Discretionary Investment” segment of the Australian Funds Management Industry (source: Plan For Life Actuaries & Researchers, year ended 30 June 2007), and is the largest manager of investment bonds in Australia, the 3rd largest friendly society, and is ranked at 115 on the BRW Top 500 Private Company list (2007).

Lifeplan is the amalgamation of many organisations and traces its origins back to the 1840's. It is headquartered in Adelaide, with offices in Melbourne, Sydney and Brisbane.

### ● THE CHALLENGE

The prudential regulator of Australia's financial services industry, APRA, introduced new business continuity management standards, increasing the requirements for mutual organisations. Lifeplan identified that it would need to develop a completely new business recovery site strategy. It needed to ensure compliance with these standards but wanted to derive other business benefits from this significant financial investment.

### ● THE SOLUTION

IBM® business partner\* locane proposed a solution built around Tivoli® Storage Manager, which would handle the transfer and automatic backup of Lifeplan's IT infrastructure to a disaster recovery site. The additional introduction of IBM BladeCenter® and virtualisation also helped to provide increased levels of agility and reduce the total cost of ownership.

### ● THE BENEFITS

Lifeplan now enjoys automated compliance that meets current industry legislative requirements and has improved its risk management profile. In the process Lifeplan has also consolidated its IT infrastructure, which helped to reduce its energy usage and deliver IT resources which can be deployed quickly in response to business needs.



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## A green field site

Following changes to the regulation of the Australian financial services industry Lifeplan found it needed to comply with new standards and set up a new disaster recovery site. As a green field site the project was a blank piece of paper and Jamie Anderson, Group Strategic Technology Manager for Lifeplan, quickly realised the project represented an opportunity to make major changes to the company's IT infrastructure and help deliver major business benefits.

Jamie reached out to IBM business partner, Jayson Gough at locane, to act as a technical advisor on the project. Jamie commented,

**“locane came up with a skeleton of a solution involving blades and virtualisation, and together we put flesh on the bones.”**

**Jamie Anderson, Group Strategic Technology Manager for Lifeplan**

The proposed solution involved the use of Tivoli Storage Manager (TSM) to transfer all of Lifeplan's systems across to the back-up site. “Once we decided to utilise TSM we figured out we needed a blade server to create a virtualised environment, and that using TSM would make the whole process seamless and simple to maintain.”

Moving to a virtualised environment was designed to free Lifeplan from the restrictions of a physical environment and be more cost efficient. “We could see that moving to IBM blades alongside VMware's virtualisation technology would give us greater server density and higher utilisation and that the whole project would deliver significant business benefits not just in terms of cost savings, but also greater business flexibility.”

Lifeplan decided to move its entire infrastructure and consolidate it onto just two IBM BladeCenter installations – one located in the company's Adelaide head office handling the company's day-to-day production environment and one located at the disaster recovery site. Lifeplan also decided to move from a tape library and implement a storage area network run by Tivoli Storage Manager, “IBM's BladeCenter is terrific hardware, robust, rock solid and well engineered. We also decided to implement a SAN managed by TSM to alleviate our storage problems and provide a more effective back up solution. It's very comforting to know we are now compliant.”

Implementing Tivoli Storage Manager has delivered Lifeplan an easy to use, automated back-up and recovery solution at its disaster recovery site, and was a key factor in helping Lifeplan to comply with APRA's business continuity management standards. Jamie explained, “TSM has brought new levels of automation to our backup processes and we can now be confident that any changes to our production infrastructure are automatically replicated at our disaster recovery site that evening. I don't have to pay consultants up to \$100,000 every year to update the documentation detailing how to recover our servers. This significantly reduces my window of risk because I know that our recovery infrastructure is always up to date.”

In addition to meeting compliance requirements, the project has also delivered other far reaching business benefits. Moving to a virtualised environment has helped Lifeplan to reduce its energy usage and Jamie has recorded some impressive cost savings,

“We are now using 18% of the energy we would have used if we had stuck with multiple discreet servers. As a result we are saving the greenhouse gas equivalent of seven households. And I can now deploy a server for about 33% of the cost, compared to my old infrastructure.”

## About locane

For organisations who depend on their IT systems to support organisational objectives, locane provides the business solutions, professional services and supporting infrastructure that will help to ensure that every dollar invested in IT delivers the maximum possible return through the application of first class expertise, resources, understanding and innovation.

**For more information on how locane's IT services can benefit your business, call +61 (8) 8413 1000 or visit [locane.com.au](http://locane.com.au)**



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