

STANDARDIZATION IS THE KEY TO A SUCCESSFUL MERGER OR ACQUISITION

According to Barron's, Mergers and Acquisitions (M&A) involving banks is on the rise again in 2018. Deregulation has a big part to play in this increase, but you might not realize the role technology plays in this activity. A marked increase in technology spending at bigger banks is driving higher returns on equity.¹ Rolta|Advizex sees every day how investments in technology are modernizing these organizations and driving transformation that ultimately benefits all stakeholders.

IT IMPACT OF M&A

Doubling the size of your organization overnight can be challenging even in a slow-moving business that operates out of the consumer's eye. If you are a financial services firm in the Southeast, that instantly becomes one of the nation's 50 largest banks, with a combined \$20 billion in assets, covering a 4-state footprint, it is bound to have a large impact on IT. Luckily for this financial services firm, they had Rolta|Advizex on board before the merger helping them through the transition.

THE VALUE OF STANDARDIZATION

Both financial firms entered the merger with a full suite of VMware products. Between them they were using vRealize Automation, vRealize Orchestrator, vCloud Suite, vSphere, and VMware Site Recovery Manager—essentially everything, but NSX.

The purchasing financial firm had an existing Enterprise License Agreement (ELA) with VMware, but the acquired financial institution did not. The firm they were acquiring had added VMware licenses ad hoc which resulted in a staggered maintenance and update schedule that was difficult to manage. Our client wasn't new to mergers and acquisitions, they had a history of acquiring 1 to 2 banks per year, but this deal was by far the largest. When the two banks merged it was imperative to our customer that IT was standardized across both banks encompassing 150-200 locations. Their goal was clear—one set of IT standards company-wide and for everyone to be on the same page moving forward with a company-wide single maintenance schedule.

The key to standardizing IT across both financial firms was a VMware ELA that encompassed all the VMware products deployed in both entities. With a single \$1.2 million ELA, the bank was able to support their full suite of VMware products with one uniform maintenance schedule. The ease of management alone was worth the price but saving 30% in VMware licensing made the total cost of ownership substantially less. The financial firm saved approximately \$200,000 per year for the three years of the ELA period—overall a savings of \$600,000. Aside from the cost, the ease of management gained by a single ELA across the entire financial firm had far-reaching effects. Ultimately, the ELA across the unified VMware environment needs fewer people to manage and less time spent managing it; one or two employees can now effectively manage the entire VMware environment spanning multiple locations. With one unified ELA, the financial firm will have an easier time with knowledge transfer if they choose to merge or acquire more firms in their future because there will be one uniform set of standards. These "soft" costs incur even more cost savings than the 30% up-front licensing savings by having an ELA with VMware.

For more information or questions please contact info@advizex.com or visit Rolta Advizex online at www.advizex.com

FIXING AN INEFFECTIVE VDI DEPLOYMENT

Rolta|Advizex has been working with this financial firm for over four years, aiding their CIO and IT team in making important IT decisions. One area where our client had struggled in the past was in effectively implementing their Virtual Desktop Infrastructure (VDI) environment. Before the merger, Rolta|Advizex had helped the bank purchase \$2.2 Nutanix nodes for their hyper-converged infrastructure and to support their VDI environment. Before this merger, about 100 users were using the VDI and it wasn't running effectively. When users were in remote locations they could not reliably log in and often could not access their applications promptly. After Rolta|Advizex stepped in and helped the firm's IT team rebuild the virtualized environment, there are currently over 1000 users using the VDI environment. Rolta|Advizex technologists helped the bank set up the VDI to work flawlessly and took care of all the existing issues. Advizex's VMware and virtualization expertise made this difficult task much simpler. Employees now trust the VDI for its fast and reliable service when they are out of the office utilizing their banking, service, and other applications. In fact, now users are lining up for access to the VDI and the nodes are almost full. The bank has plans to purchase more nodes now that the VDI is such a success for the employees.

UNPARALLELED VMWARE EXPERTISE

Rolta|Advizex was initially selected by the bank because of their VMware expertise and their reputation as the "best in Nashville." Rolta Advizex is one of the select few companies worldwide that has three VMware Certified Design Expert (VCDX) professionals on staff. Out of 271 VCDX worldwide, the bank was lucky enough to have two of them work on their VMware VDI deployment. The VMware expertise of the Rolta|Advizex team evokes the trust of our customers. They seek our advice when making critical IT decisions.

¹Source: Barron's (<https://www.barrons.com/articles/more-bank-mergers-are-on-the-wayfinally-1527002414>)

BUSINESS PARTNER AND ADVISOR

The bank only does business with a select few partners. The CIO trusts Rolta|Advizex as a business partner, not just a vendor or reseller. The CIO chooses to only work with partners who add value to their organization. Rolta|Advizex fills this need in many ways. Our team presents in-depth technology workshops at the customer site before purchases are made and presents the pros and cons of each solution. One of our VCDX professionals on staff, Joe Clarke presented workshops on hyper-converged infrastructure, so the financial firm could make an educated decision about a future technology investment. After over four years, Rolta|Advizex knows the

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