

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

CARLYLE

The CTERA solution cost less than annual maintenance for Carlyle's previous distributed NAS architecture, driving significant savings.

CHALLENGE

Modernize File Infrastructure with Cloud-Enabled Access Solution

The Carlyle Group sought cloud file access to resolve global outages and protect critical data.

SOLUTION

Deployed CTERA Platform for Global File Services

CTERA's hybrid solution replaced legacy servers, unifying global file access, sync, and AWS cloud backups.

OUTCOME

Delivered Secure, Cost-Effective Private Cloud Storage

CTERA's private cloud architecture provides Carlyle with top-tier security, rapid disaster recovery, and cost savings.

KEY RESULTS



"Always-on" file access for globally distributed offices and users



Enabled instant business continuity



Immediate ROI by eliminating legacy backup processes



Eliminated silos of systems administration

"The CTERA deployment is a huge win for us. We're able to solve the problem of real-time data availability, strengthen our business continuity agenda, and save a lot of money in the process."

Jeff Pisano

Vice President of IT, The Carlyle Group

INDUSTRY

Private Equity

REGION

Worldwide

PRODUCTS

CTERA Intelligent Data Platform

USE CASE

NAS Modernization & File-based collaboration

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

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.

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 filesEnhance cyber-resilience, data protection, & compliance
- Manage sensitive data including GRC use cases such as HIPAA, PCI, PII, GDPR, CMMC, FINRA, and others

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.

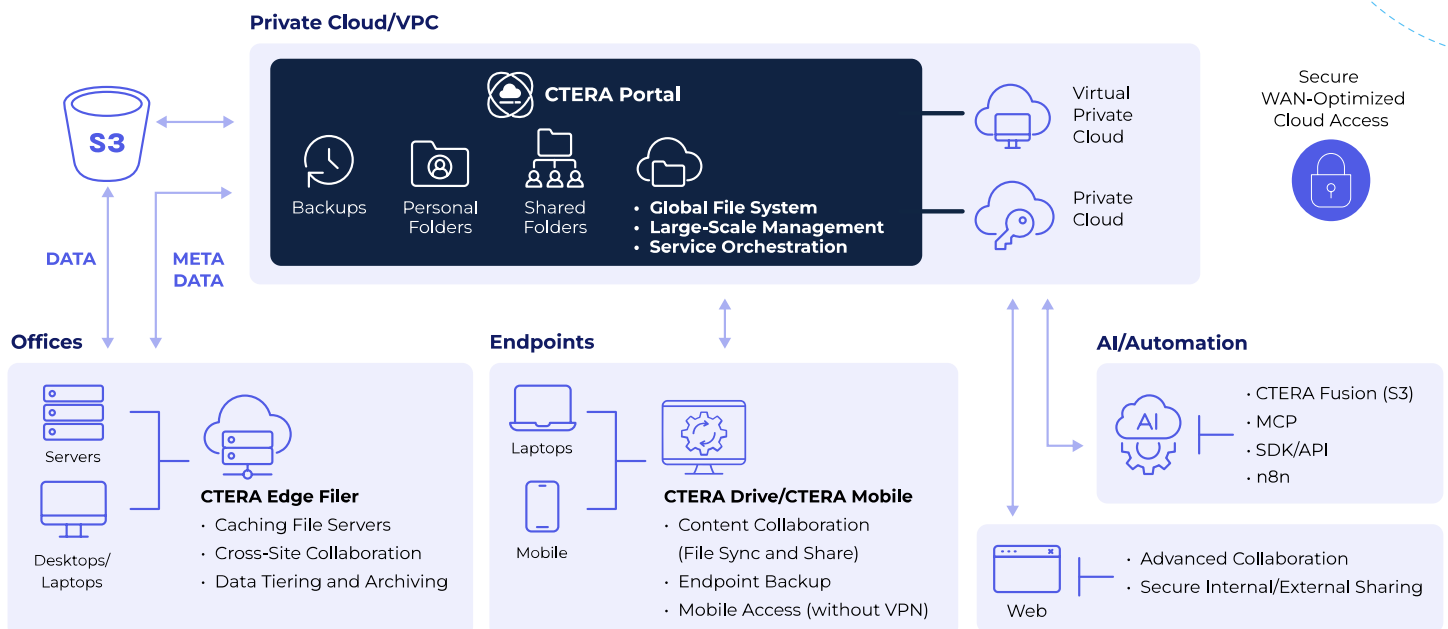
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Key Results & Benefits

- Seamless Global Collaboration**
CTERA's sync engine consolidates file changes across offices, giving teams real-time local access to updated files and previous versions.
- Uncompromised Enterprise Security**
Carlyle maintains full ownership of data, authentication, and encryption keys within its AWS private cloud, minimizing hacking risks.
- Rapid Disaster Recovery**
If local gateways fail, user machines automatically remap to the cloud via WebDAV, ensuring immediate continuity and uninterrupted productivity..=
- Significant Cost Reductions**
The full CTERA implementation cost less than the annual maintenance fees of Carlyle's previous distributed NAS server architecture.



CTERA Intelligent Data Platform Solution Architecture



The CTERA Intelligent Data Platform

The CTERA Intelligent Data Platform unifies local, cloud, and remote data, creating a single, secure namespace for users and applications. Its architecture modernizes file storage, enabling multi-site collaboration and automated data protection across the enterprise.

Easy to deploy and manage from a single pane of glass, CTERA Edge Filers and endpoint agents replace traditional file servers and NAS. They work in concert with the CTERA Portal to deliver a cost-effective, cyber-resilient solution that provides secure edge-to-cloud file services.

- **A Unified Global File System:** Seamless file access from any office, device, or cloud.
- **Cyber-Resilient Data Protection:** Instantly recover from ransomware with immutable snapshots and zero-day threat detection.
- **Cloud Tiering:** Reduce storage costs by tiering files to the most efficient storage layer without impacting user access.
- **Centralized Management:** Control and secure your entire distributed file infrastructure from a single console.
- **Scalable Multi-Tenancy:** Effortlessly manage complex, multi-department organizations from a single platform, providing secure, isolated file services for different business units or even empowering service providers to manage their own infrastructure
- **Enhanced Productivity:** Empower your remote and distributed workforce with secure, fast, and collaborative access to files.
- **The Highest Level of Security:** Protect your data with end-to-end encryption, multi-factor authentication, and a zero-trust architecture.

CARLYLE

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.

Ready to future-proof your organization?

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