

WORKPLACE RECOVERY

Baillie Gifford invests in business continuity to maintain competitive edge



Baillie Gifford manages funds for some of the world's leading institutions from its base in Edinburgh, Scotland and is one of the UK's largest independent investment management firms with 700 staff and around £70 billion under management in active equity and bond portfolios. Its success has been built on the stability of its partnership structure, which provides reassurance for clients and motivation for employees.

The firm's 17-year investment in Information Availability means it has a well developed and comprehensive business continuity strategy that it believes gives it a competitive advantage. Richard McGrail, Head of Information Systems for Baillie Gifford explains, "Clients want to know that, whatever happens, they can rely on us to continue to deliver the same high levels of service. We were looking for a solution that would safeguard our key services, both in a day-to-day contingency and a full disaster recovery situation. We have worked closely with Sungard to build a solution that will enable business to continue uninterrupted."

Over the years, Baillie Gifford has developed sophisticated IT applications tailored precisely to the firm's needs, all of which are critical to the business. Consequently, it constantly refines its business continuity plans to ensure they can adapt to any threat from an individual server failure to the wholesale loss of its building.

With the size and complexity of Baillie Gifford's IT recovery increasing year on year, its IT team face intense pressure

to recover systems like Exchange and Oracle very quickly as staff need to be in contact with clients and brokers must be fully aware of their clients' market positions. To this end, the firm contracts colocation space at one of Sungard Availability Services' workplace recovery centres to house a number of mirrored servers that use replication software to integrate with Baillie Gifford's own Local Area Network (LAN).

Baillie Gifford also contracts over 450 Workplace Recovery seats at the recovery centre. However, Baillie Gifford's recovery strategy has evolved as the firm has increasingly adopted mobile and remote working practices. Today, rather than relocate large numbers of staff to one of Sungard AS's workplace recovery centres in the event of a minor disruption, the majority now have the ability to work at home. However, for longer periods of disruption the recovery centre remains an invaluable resource.

The firm conducts five technology tests and several ad hoc tests every year to ensure it can recover its most important systems in an hour and get all other

Business challenge

Leading independent investment manager Baillie Gifford relies heavily on sophisticated technology in every aspect of its business from investment research and dealing to performance measurement and client reporting. The firm places great importance on managing business risk and its 17-year commitment to business continuity has made it highly resilient. While Baillie Gifford manages its many bespoke applications itself, it needs a partner with an infrastructure of sufficient size and scale to meet its Recovery Time Objectives so that it can focus on its core business.

Solution

- Workplace Recovery
- Colocation/Managed Hosting.

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Richard McGrail,
Head of Information Systems,
Baillie Gifford



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Brian Hunter,
 Information Assurance Manager,
 Baillie Gifford

Business benefits

- Mitigates risk of downtime
- Ability to meet Recovery Time Objectives
- Preserves Baillie Gifford's reputation for service
- Avoids financial loss
- Peace of mind for employees and clients
- Ensures compliance with regulatory requirements.

systems up-and-running within eight hours. It also performs several scenario tests, which are driven by business risk. Business continuity is thoroughly embedded in the firm's culture and new starters are often taken to the Sungard AS test site to familiarise themselves with the facility.

Managing business risk is something Baillie Gifford takes extremely seriously. In fact, Joint Senior Partner and CEO Alex Callander states, “A major part of our strategy is to ensure that clients consistently receive the high levels of service they deserve, even in the event of a disaster befalling our premises or major systems. We have steadily improved our recovery planning and capability to the point where we feel we could continue business as usual quite quickly after all but the worst form of incident.”

Although Baillie Gifford is remarkably self-sufficient, Brian Hunter, the firm's Information Assurance Manager, stresses, “Sungard's size and the scale of its infrastructure – its numerous recovery sites and rollback capability – still gives us a lot of comfort. It is light years ahead of the competition so it's encouraging that it continues to invest.”

Baillie Gifford values the deep relationships that have been built over 17 years. Brian Hunter remarks, “It's good to have that consistency and we've got a great relationship with the guys on the ground. Even though, like us, Sungard has grown over the years, it still has that personal touch.”

About Sungard Availability Services

Sungard Availability Services provides managed IT services, information availability consulting services, business continuity management software, and disaster recovery services. To learn more, visit www.sungardas.co.uk or call 0800 143 413

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