

Securing Virtual Servers and Desktops for Financial Customers

Financial services provider builds in PCI-compliant protection with Trend Micro™
Deep Security and endpoint security.

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and fit our centralized managed services model.”*

—Jeff Jackson, Partner and Principal Consultant, Acumen Technologies, Ltd.
(managed services provider for Omni Companies)

EXECUTIVE SUMMARY

Customer Name: Omni Companies (Omni)
Industry: Financial Services and Insurance
Location: Vancouver, Canada
Web site: www.omnicorp.ca
Number of Employees: 100

CHALLENGE:

- Introduce a virtualized infrastructure that can securely deliver services and target PCI compliance
- Extend protection out to employee and customer virtualized desktops
- Avoid security-related slowdowns on shared production resources
- Minimize complexity and management while maximizing preemptive protection

SOLUTION:

- Trend Micro Deep Security, protecting virtual servers in outsourced data center
- Trend Micro™ Enterprise Security for Endpoints, protecting standard and VDI desktops on the company’s network and at remote sites

BUSINESS RESULTS:

- Proactive threat protection, including in-the-cloud security technology
- Agentless antivirus deployment for scalable and lightweight security
- Support for industry-leading virtualization platforms and operating systems
- Enhanced visibility for efficient, central management of security
- Robust security, with PCI-compliant capabilities, that helps sell online services to security-sensitive customers

Challenge

With an impressive list of ‘blue chip’ financial services customers, Omni sets high standards for securing its mission-critical infrastructure. The best-in-class business recently introduced an innovative new online delivery model for its warranty management services. Omni replaced its traditional paper-based ordering and claims management with a custom software-as-a-service (SaaS) solution.

“Dealerships can now log in and generate warranty policies online,” said Jeff Jackson, partner and principal consultant at Acumen Technologies responsible for deploying and securing Omni’s new infrastructure. “To make that happen, Omni brought us in to execute a Security, Hardening, and Compliance project.”

The technology partner faced the challenge of building a highly cost-effective and easy-to-manage virtual infrastructure, as well as securing that infrastructure.

“Our goal was to come up with a foundation that was compliant with the standards required in the insurance and finance industries, and to make sure it was scalable,” said Jackson. “The answer was a VMware cluster of servers hosted by a local data center service provider, and tied into Omni over an internal MPLS network. This would ensure an always-on service for dealers and employees, but required that we secure virtual desktops as well as the data center servers hosting the service.”

Solution

“We wanted security on a level that would give confidence to Omni underwriters and customers—on par with PCI compliance,” said Jackson. “The data center already had physical security; what we needed was a shield around the servers. Trend Micro Deep Security, with several layers of protection for virtual servers, fits very well into our customer-facing infrastructure.

“Trend Micro Enterprise Security for Endpoints complements our data center security, and extends protection out to virtual desktops for employees and customers. Virtual desktops can still introduce threats; it was important that we harden the infrastructure all the way out to each remote site.”

The combination of data center and endpoint security lets Omni scale protection as the infrastructure and customer base grow. “Trend Micro’s data center and VDI security solutions keep security scalable and simple, and fit our centralized managed services model,” said Jackson. Acumen provides full-time on-site IT support, IT governance, and project portfolio management for Omni. “Without adding any new hardware, we can have a new employee or customer up and running securely in minutes.”

The Trend Micro solutions at Omni leverage the threat intelligence of the Trend Micro™ Smart Protection Network™ infrastructure. This next-generation innovation combines sophisticated cloud-based reputation technology, feedback loops, and the expertise of TrendLabs™ researchers to deliver real-time protection from emerging threats.

“The way that Trend Micro approaches security, with the Smart Protection Network infrastructure, was the reason we chose Trend Micro solutions,” said Jackson. “Trend Micro is more proactive in understanding the security landscape and knowing how cybercriminals are working. To predict and preempt threats, you have to have this understanding. Trend Micro does, and as a result, the Trend Micro solutions can detect threats very quickly.”

Results

The Trend Micro solutions proved to be very easy to implement. “Trend Micro keeps the interfaces as simple as possible, and gives us the support we need to get up to speed on the solutions very quickly,” said Jackson.

Today, Omni has confidently introduced its transformational online services. “We needed to secure a complex production environment—servers, endpoints, and virtual desktops,” said Jackson. “Security had to support the latest operating systems and the most current virtualization technology. Trend Micro met the requirements of our virtualized service delivery infrastructure. They think about security in a way that makes us feel more confident—they understand virtualization and threats, and they give us the visibility we need to do business in the online world.

“Deep Security preempts and really shuts the doors on threats for virtual environments. The Trend Micro solution also gives us really good reporting and status updates. With Trend Micro security, we have great visibility over our total environment.”

The new solution has also been carefully evaluated in terms of performance. “As important as security is, it absolutely cannot interfere with business transactions,” explained Jackson. “This is a production environment, and you can’t have security slowing down your database management systems. Trend Micro Deep Security, with its agentless architecture, is very lightweight in a virtual server environment. And we can tailor policies to each virtual server’s requirements based on the applications. It is a very efficient and flexible solution. Partnering with Trend Micro really helped make this project a success.”

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DEPLOYMENT ENVIRONMENT

- 3 sites
- 100 PCs (including 50 laptops)
- Cluster of 3 servers, hosting a VMware environment
- Citrix XenApp software for hosting virtualized desktops
- Custom software-as-a-service solution (warranty orders and claims processing)
- Trend Micro Enterprise Security for Endpoints
- Trend Micro Deep Security

Company Profile

The Omni Companies (Omni) provide finance and insurance solutions for a variety of industries. Acting primarily as a Managing General Agency (MGA), Omni acts on behalf of its clients to provide innovative product solutions that are backed with sound underwriting. Omni is recognized for providing quality support and administrative service standards that ensure a program’s success.

Service Provider Profile

A respected IT infrastructure consultancy in Vancouver, B.C., Acumen Technologies brings in-depth experience implementing and managing solutions for its customers that range from small businesses to large enterprises. With pioneering experience in virtualization solutions, Acumen can draw from a large base of subject matter experts in security, compliance, infrastructure, and networks. The consultancy services portfolio has evolved from design, implementation, and support of IT and communication systems in the resource, transportation and insurance sectors. For more information, please visit www.acumentech.ca.

Trend Micro Security

- **Trend Micro Enterprise Security for Endpoints**
<http://us.trendmicro.com/us/products/enterprise/security-for-endpoints/index.html>
- **Trend Micro Deep Security**
<http://us.trendmicro.com/us/solutions/enterprise/security-solutions/virtualization/deep-security/index.html>

Trend Micro Enabling Technology

- **Trend Micro Smart Protection Network**
<http://us.trendmicro.com/us/trendwatch/core-technologies/smart-protection-network/>



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