Desktop as a Service (DaaS) and the Modern Agency: Reducing Costs, Increasing Flexibility, and Enhancing Security

White Paper
Modern agencies have made great strides in productivity, engaging automation, streamlining workflows and giving their staff quick access to the information they need on their desktops.

However, until recently, the task of managing those desktops has been reactionary, with manual processes and infrastructure procurements draining IT resources and bottom lines alike.

When performance slowed, or server capacity no longer met agency demand, owners had few options but to invest capital to upgrade the infrastructure. Not only is this expensive, but predicting needed capacity three years down the road is a challenging prospect. Buying too much is a budgetary waste; too little could spell business disaster.

As agencies eliminated paper and added software tools, desktop management itself became more complex. The traditional model was device-centric, requiring IT personnel to go from desktop-to-desktop or laptop-to-laptop, adding patches, upgrades, and performing necessary maintenance—all taking time away from more strategic projects that supported agency growth. Meanwhile, employees were tethered to their desks, unable to work remotely in a world that’s become increasingly mobile.

This disparate desktop landscape also raises security concerns. If a desktop, laptop, or even a flash drive left in a desktop is stolen, proprietary agency or customer information goes with it, putting everyone at risk. If disaster strikes, business comes to a standstill.

As inefficient as it is, for years, this approach to desktop management was the only financially feasible option for most agencies. Then came cloud.

**Cloud Comes of Age. New Options Emerge.**

In a matter of years, cloud-based computing and storage solutions have fundamentally changed how companies conduct business and procure technology. It has commoditized IT, delivering infrastructure services in a utility model, purchased on the same as-needed basis as phone service or kilowatt hours of power. What was once CapEx becomes OpEx, with the flexibility to adjust consumption as business needs dictate.

The rapid evolution of cloud has spawned the “as a Service” era, in which companies can get everything from software to storage, security to analytics on demand. Modern agencies have embraced the concept, eager to get out of the hardware procurement and software licensing business; and shift the focus back to growing their agency.

Now, Vertafore has applied this agile, as a Service model to desktop management with significant results. The offering, called Desktop as a Service (DaaS), centralizes desktop management in a secure, virtual environment. This model decreases costs, reduces the time IT spends on maintenance, and gives users secure, anytime, any device access to the applications and tools they need to work.

Instead of loading applications and accruing data on individual desktops or laptops, everything associated with that desktop—compute power, persistent storage, and applications—are deployed through the cloud. That means data access and applications are
tied to each individual user, not a physical machine. So, employees can access their “desktop,” through a secure log-in, on any device with an Internet connection—be that the company desktop, a laptop at home, a tablet, or smartphone. All updates, patches, and support is centralized and handled by your DaaS partner, which speeds deployment and frees your internal IT staff to focus on more strategic projects. Users get a desktop that looks and feels like what they had before, with more compute power for higher performance. Agency owners not only reduce costs, but have a predictable, arithmetic IT cost per employee for better planning. Everything is streamlined and simplified.

One good way to understand the impact is to compare the onboarding process in a traditional and a DaaS environment.

In traditional desktop management, when an agency hires a new CSR, a series of events have to occur before that new staff member has all the necessary equipment needed to do their job. Someone has to request a workstation, and then someone from IT, or a retained tech provider, has to go to prepare that desktop. That includes loading the latest version of the appropriate agency software solutions, productivity software like Word, Excel, PowerPoint, handling the network configurations, mapping email accounts, and verifying that everything works correctly.

With DaaS, the agency administrator emails the provider, requesting a new CSR desktop, with predetermined applications for this agency position. The provider provisions the fully configured virtual desktop in hours. The user receives login instructions and is ready to access their work environment from any device. If an employee leaves, one email to the provider spins down that desktop. The agency can scale up for peak seasons, easily onboard acquisitions or scale down with divestitures, all without long wait times or capital expenditures.

Instead of spending money on hardware and software licenses, owners can invest in growth initiatives.

Traditional Desktop vs. DaaS: Security, Simplicity and Cost

For some agencies, this newfound flexibility and low maintenance are reason enough to transition to a DaaS model. However, the benefits of DaaS over traditional desktop management extend well beyond the agility of this pay-for-what-you-use platform.

A centralized, virtual environment actually increases security. Employees login, through your Active Directory, so you don’t give up any protections built around the data. However, with DaaS, if a device is lost, stolen, or otherwise destroyed, you lose the hardware only. The confidential agency and customer information is no longer loaded onto the device. So, your information stays secure and out of the wrong hands. If your office is flooded, damaged, or destroyed, you no longer have to load tapes, reconfigure new PCs and hope the last backup captured was sound. Your employees simply log in to a device with Internet connections from their homes, a temporary facility, or a remote office 1,000 miles away, and you’re back in business.

In the past, keeping desktop performance high while adding users was a guessing game. How many more terabytes, what sort of capacity will we need for the next three years? That’s a difficult task for most, but at the speed in which business and technology changes today, it’s hard to predict future use accurately. Most companies end up falling short, or paying for more than they need. DaaS simplifies all of that.
Unlike other technology transitions, most agencies realize immediate cost savings over traditional desktop management or in-house virtual desktop solutions. These initial savings compound over the long term, eliminating the three-year cycle of hardware procurement, as well as the associated IT maintenance and administrative costs that go hand-in-hand with that process.

Combine this cost benefit with the fact that moving to DaaS is far easier than a system upgrade, with no training and minimal downtime, it’s not surprising that some analysts are predicting significant DaaS adoption across all industries, in businesses of all sizes. The inherent qualities of an insurance agency operation, coupled with an industry trend toward merger and consolidation, make any agency with at least 10 users up to enterprise level ideal candidates for the DaaS model.

Desktop as a Service Enables Agencies to:
- Reduce costs and capital expenditures.
- Get out of the hardware acquisition business.
- Gain flexibility and scalability.
- Increase security.
- Use IT resources for strategic projects, not desktop maintenance.
- Give their staff any-time/any-device access to agency resources.

The graph highlights the projected total cost of ownership for a client with three locations and 50 users, looking at services, hardware, and software licensing costs.
Finding the Right Combination of Cloud and Managed Services Provider

Although DaaS simplifies desktop management, it’s important to note that orchestrating a DaaS initiative is not a do-it-yourself project.

Just as you need an electrician to wire your house to take advantage of electricity on demand, a strong managed services partner is critical to DaaS—not only to design, architect, and implement these services, but also to provide ongoing support.

Vertafore DaaS blends the resources of a leading cloud provider with the experience and insurance industry expertise of Vertafore to create a solution that delivers value from day one.

Amazon and Vertafore: A Powerful Combination

Vertafore DaaS is comprised of three components: Amazon Web Services, Amazon WorkSpaces and Vertafore Managed Services.

Amazon Web Services provides the underlying cloud infrastructure; the virtual data center that replaces your in-house servers, Microsoft server licensing, remote access, and disaster recovery solutions currently tied to your servers.

Amazon WorkSpaces provides the fully managed desktop service, replacing the desktop hardware refreshes, virus protection, and Windows and MS Office licensing you currently purchase, install, and update.

Vertafore Managed Services’ engineering team provides design, implementation, data migration, and ongoing support for your desktop environment, supplementing your in-house staff or local IT vendors. As part of the managed services, Vertafore facilitates the account setup and direct billing between Amazon and the customer. In essence, we execute the solution using Amazon’s cloud resources and keep your DaaS solution delivering value.

Vertafore has chosen Amazon as our cloud provider for a number of reasons. First, Amazon is the leader, with more than five times the compute capacity than its major competitors combined and strategically placed data centers worldwide. This breadth ensures our customers have the scalability they need and the availability they want, at the lowest possible price by capitalizing on Amazon’s economies of scale.

Amazon designed its cloud in alignment with regulatory compliance standards, including all of those that impact the insurance industry. Finally, its cloud infrastructure is proven, used by some of the most recognized companies and organizations around, including NASDAQ, Ticketmaster® and Dole® Food Company, among many others.

Vertafore’s 25 years of experience designing innovative infrastructure solutions for independent insurance agencies makes it uniquely positioned to successfully deliver both Desktop as a Service and Infrastructure as a Service, with Amazon as our partner.
Amazon WorkSpaces also provides numerous advantages, and offers a variety of bundles with different amounts of CPU, memory, and storage, so you can choose the option that’s right for your agency. You can have the flexibility to use any number of pre-installed applications, like Microsoft Office, or you can use your own licensed applications for the solution—so you’re not wasting any investments you’ve already made. Just as important, you stay in control. Amazon WorkSpaces securely integrates with your corporate Active Directory, so your agency staff can use their existing credentials to access agency resources. You also get access to persistent storage in the Amazon cloud, for added security.

The third component of this solution is Vertafore Managed Services. Our engineering team handles everything from order to implementation and support on your behalf, at a predictable monthly rate. Because we specialize in the business of insurance, we understand how your agency operates. We also know how our own systems function, for a simplified move to a DaaS environment.

What to Expect

Transitioning to Vertafore DaaS is much different than orchestrating a system upgrade or implementing a new software solution. In fact, when done correctly, it is transparent to your users, with no business interruption or downtime.

Once your agency signs on as a DaaS customer, our engineering team provisions storage, and, using a utility on the file server, we copy files over to the new environment during non-work hours. Everything happens behind the scenes.

The Vertafore team builds the environment, provisions all needed services, and builds out your workstations in the cloud. As we go through this process, we give you an opportunity to take a look at what we’ve done and to confirm that it’s what you want the desktop to look like. In most cases, the DaaS model looks similar, if not identical, to what the agency had before.

There’s no staff training or change management needed prior to go-live. Your staff will receive their login credentials, and on the first day of the transition, they log in, and work exactly as they did before. The difference is, the experience is now better and faster, with the advantage of mobile access.

When to Make the Move

Although there’s not one “right time” to transition to DaaS, most modern agencies make the move when they’re considering an infrastructure upgrade of some type. DaaS enables them to get the performance required without the capital investment, capacity projections, and pain.

Other agencies roll out DaaS in phases, starting with an acquisition or user group, as proof of concept. Typically, when agencies realize the immediate cost benefits, the security advantages, and the scalability, they’re quick to continue the implementation agency wide.

No matter what triggers the change, it’s important to step back, look at where you want to spend your agency’s time and resources, and find out how DaaS could impact your agency. As other agencies of all sizes and specialties have discovered, the way they manage desktops can make all the difference.
The Modern Agency Perspective: Three Agencies That Transitioned to Vertafore DaaS Share Their Stories

These three agencies are different, in terms of size, need, and why they made the transition to Vertafore DaaS, but, all have two things in common: they had the vision to make the change and have started seeing real benefits, without downtime or business disruption.
Declaration Brokerage

Mahwah, New Jersey

- Formed September 2013
- Strong acquisition strategy
- Wanted fast onboarding for new users and predictable per-user desktop costs
- 3 locations
- 13 users
- Uses AMS360® Online

“With Vertafore’s DaaS, I can accurately forecast, to the dollar, the cost of provisioning the desktop and application resources required to onboard a new user or acquisition.”

Carl Gerson
Managing Director/Agency Principal, Declaration Brokerage

Declaration Brokerage was formed September of 2013 by Capacity Coverage of New Jersey and Dowling Capital Partners in Mahwah, New Jersey, with a clear strategy. The agency would grow through acquisition, targeting mid-market retail insurance brokers that specialized in commercial lines accounts.

Bringing those acquisitions on board quickly was critical, even though the users would operate from remote locations. Equally important was the ability to accurately forecast onboarding costs, for due diligence prior to acquisition. Both factors lead this AMS360 online user to Vertafore’s DaaS managed services solution.

“As a new company, we didn’t want to tie up capital or invest in in-house IT resources, but we needed a fast and cost-effective way to give our acquisitions access to our systems, data, and software. Vertafore’s DaaS met all of those needs,” said Carl Gerson, Managing Director and Agency Principal for Declaration Brokerage. “The costs per user are very affordable and predictable, and the fact that Vertafore manages everything on our behalf enables us to focus on our business. We don’t have to worry about loading software or backups. It’s all taken care of.”

Gerson had the opportunity to test Vertafore’s response time with the firm’s first acquisition, a 25-year old commercial and personal lines agency based in Pennsylvania.

“The provisioning process was totally seamless. With a single request to the Vertafore help desk, the provisioning was completed perfectly the first time around in the required timeframe,” Gerson said.

With a strong leadership team, sound financial strength, a clear strategy, and Vertafore DaaS, there’s nothing that can slow Declaration Brokerage down.
Coughlin Insurance Services

Coughlin Insurance Services is a thriving, full-service agency with three geographically diverse offices—two in New York and one in Los Angeles. The firm was using in-house servers to host their Citrix environment for their remote offices, but individual desktop management slowed progress down. The agency was also due for a software refresh, wanting to move from Windows XP to Windows 7; from Exchange Server 2003 to a hosted Exchange environment.

“We looked at the options and saw real value in Vertafore’s DaaS through Amazon,” said Andrew Maceda, Director of IT for Coughlin Insurance Services. “We could standardize our desktops, set up group policies, and manage our environment more efficiently. It also enabled us to spread our costs, instead of requesting big capital expenditures every couple of years. If a workstation broke down in our L.A. office, that user just moves to another computer and keeps on working.”

Another key feature for Coughlin Insurance Services was the ability in AWS to install individual software for role specific tasks. “In the Citrix environment we’d have to log everyone off in order to load a software program, because the Citrix environment is a shared infrastructure,” stated Maceda. “In the AWS environment, each workspace acted as a standalone computer, meaning individual updates could occur without forcing everyone off of the network. This helped our post-migration adoption as well, because our staff would log into their workspace and it looked and acted just like their regular computer.”

“Our migration process was smooth and efficient because Vertafore knew what they were doing,” exclaimed Maceda. “Before they even came on-site, they had already set up the virtual servers. Additionally, they migrated us into the hosted Microsoft Exchange environment and off of our own exchange servers, 2-3 weeks prior. This staged approach eased us into being able to manage the differences and not become overwhelmed.”

In the past, the agency performed nightly tape backups, which Maceda took with him. Vertafore DaaS relieves him of that burden—and the accompanying worries.

“Now, everything is proactively backed up to two Amazon regions. We don’t have to worry about disaster readiness or business continuity,” Maceda said. “Combine that with the cost benefits and the simplified management, and the whole offering just made a lot of sense to us. We’ve only been up a month, but I already feel like we’ve made the right choice.”
The Hamilton Group

The Hamilton Group is a New Jersey-based regional insurance brokerage firm that’s been providing risk management solutions to businesses and individuals for the past 50 years. Yet, every two-to-three years, agency leaders felt like they were in the technology procurement business; upgrading hardware, adding server capacity and licensing software to support the operation.

Last year, Agency Principal Larry Chasin decided it was time for a change.

At the time, the agency was running Windows XP and an older version of Office, and running out of space on its hard drive. Although agency leaders went through the traditional proposal route, they also decided to look at two virtual desktop options, one being Vertafore’s DaaS with Amazon.

“Compared to ‘owned’ desktop solutions, making the move to a DaaS was a no-brainer—and Amazon’s pricing and capacity was unbeatable,” Chasin said. “It also eliminated the computer room procurement process we faced every couple of years, so we could get back to focusing our time on insurance. Through Vertafore DaaS, we could stay up-to-date with the latest technology and software more easily, without the capital investment or license management.”

The transition to Hamilton’s new DaaS environment was totally seamless, with no business interruption.

“Our staff left on Friday, and when they came in on Monday, everything was ready for them. Other than teaching them how to use Windows 7 and the newer version of Office, moving to Vertafore’s DaaS required zero training or downtime,” Chasin said.

Not only does the staff have any-time, any-device access to the tools they need, but The Hamilton Group leaders know that their data is backed up and ready for access, in case disaster strikes.

“The more we used digital transactions, the fancier, more expensive tapes we used for backup. Even then, we never really knew if the tapes would work if we needed them,” Chasin said. “Now, we have redundant backup to two data centers, managed by Vertafore. We never have to worry about data recovery—or spend time and effort backing up tape.”

Now, The Hamilton Group is ready for anything, and staff and leadership alike are applauding the change.

“We looked at all of the options, and moving to Vertafore’s DaaS was a no-brainer. The overall economic benefit is obvious. We get out of the hardware procurement business and we have reliable, redundant backups without tape.”

Larry Chasin
Agency Principal, The Hamilton Group

The Hamilton Group
Cedar Knolls, New Jersey
• Formed in 1964
• Needed to move from Windows XP and an old version of Office
• Wanted to get out of the three-year hardware procurement cycle
• 40 users
• Uses a competing agency management system and Vertafore content management

“We looked at all of the options, and moving to Vertafore’s DaaS was a no-brainer. The overall economic benefit is obvious. We get out of the hardware procurement business and we have reliable, redundant backups without tape.”

Larry Chasin
Agency Principal, The Hamilton Group

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