



Partnering with Partners: A Winning Strategy in Data Retention

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Where to begin? This is oftentimes the key question in beginning to devise a data retention strategy for your organization. You've learned what data retention is, why it's necessary, and the benefits of doing it. But where and how do you begin to develop that strategy fully and translate it into a working solution?

If you have the thinkers and doers in your organization, you can devise a strategy on your own, but sometimes you need help getting started. A third party advisor or consultant can get you there - and usually at a lower cost than trying to do it all on your own with limited resources and bandwidth (not to mention the opportunity cost associated with usurping the time of the key people in your organization).

Furthermore, once the strategy is devised, you will most likely need help in seeing it become reality. Data retention is a key element in information lifecycle management, and drives a lot of considerations - from internal business processes and workflow to infrastructure impact and requirements. Partnering with a capable and trusted solution provider will enable you to achieve that desired reality more readily, more practically, and more efficiently.

Getting Past the "Vendor" Label

I'd like to challenge "conventional wisdom" for a moment. Some organizations view vendors merely as that - a vendor. An impersonal, interchangeable commodity. But in the world of IT, where technology MUST be able to SERVE the business needs, I would assert that an "IT Solutions Vendor" must be more than that. They need to be a trusted advisor, a reliable partner, who will invest time and effort in helping your business thrive.



A partner (or better yet, a strategic partner) who is an IT solutions provider needs to learn your business, understand your needs and what is driving your success (or lack thereof), and prove to you that they are a worthy provider of solutions that will help your organization overcome an obstacle, solve a problem, and add value to your bottom line.

Adopting a partner mentality does not mean you give up on the goal of cost effectiveness. You CAN have a solution at a price with which you are comfortable. A good partner who is designing and proposing a solution for your organization should demonstrate that (a) the solution pays for itself (i.e. the highest ROI and/or the lowest TCO you demand and expect), (b) is comparably priced relative to alternatives, and (c) will help your organization save money or increase revenues (with a tangible, real depiction of HOW). Expect it. Demand it. After all, true partners are good listeners, accountable to their promises, and appreciate a client who is up-front about expectations.

A Value Net of Strategic Partners

Datatrend is the type of IT solutions provider who believes fervently in strategic partnering. And in the area of data retention solutions, it is especially important. That is why we have aligned ourselves with best of breed partners - manufacturers, ISVs (independent software vendors), SIs (systems integrators), and more - to develop a data retention solution that is:

- Comprehensive - Offering a complete, end-to-end, fully integrated solution is extremely important to a client who is looking for a total solution that leaves no guesswork, and will "stick" and deliver on its promises of added value.
- Flexible - The solution must be adaptable so it can be "molded" or tailored to the specific needs of the client, and the solution must also be able to be "unbundled" in the event that a comprehensive solution is not needed (e.g. the client may already have a piece of the solution that is workable and able to integrate into the overall data retention solution).
- Repeatable - To deliver the best price to the customer, the solution must be designed in such a way that it can be readily developed and implemented in a variety of types of organizations and environments, and built upon best practices and lessons learned from experience.

To use Datatrend as an example, to augment our own strengths in data retention, we have intentionally developed strategic alliances with the best partners - those that know data retention inside and out, have tremendous experience and depth of expertise, and most importantly listen to customers and deliver the highest level of customer service and satisfaction. These partners include storage hardware manufacturers, storage software providers, other software providers, and services providers. And we are constantly evaluating the makeup of our value net to ensure we are well poised to deliver the best data retention solutions in the industry.

Why not all in one? Wouldn't it be better to use a single solution provider to do everything? Sometimes, yes, depending on the type of solution. A data retention solution is, by definition, a solution which crosses boundaries from an IT perspective and touches varying types of business disciplines in an organization. Managing the lifecycle of data/content based upon its changing business value over time involves a number of considerations - infrastructure, policies, automation, workflow, etc. - and touches the entire IT infrastructure, from foundational architecture and operating system to networks to middleware to applications. A viable solution needs partnering, integration, and cooperation between providers. A single provider can rarely do it all without a value net - at least not really well with maximum cost effectiveness. The value net brings together a group of partners who are experts in their particular fields and have committed to one another to build a fully integrated solution that leverages the best features and functions of each part or aspect of the solution and is a proven success in terms of marketplace adoption.

One word of caution: When you take advantage of such a value net, be sure you know who the "primary" party is. That is, the best value nets are those who have developed a simple and effective means to partnering, so that, to the customer, there is a united front and a "single face", with one partner acting as the "lead." You deserve to have "one throat to choke" (or better yet, "one back to pat!"). If you have this kind of value net working to design and deploy a data retention solution for you, the sum is truly greater than the parts (1+1+1 = more than 3!).



Tying it All Together

So we're back to ... Where do I begin? Find a partner with the right kind of value net, the kind of partner that knows how to take the "pieces" from the manufacturers and software providers and translate them into an optimized solution architecture and deployment methodology. Firms like Datatrend have consultants that follow a specialized solution methodology and employ a customer-centric project management approach. This methodology and approach guarantee that the identified business objectives and requirements of the client are met - completely and to the utmost in satisfaction. And these objectives and requirements are not only met at the end of the project, but are reviewed on an ongoing basis throughout the entire lifecycle of the project to ensure that the project is delivered on time, within budget and with the expected results. This process also ensures that, as business requirements change or technical considerations interfere with the achievement of an objective, project issues are quickly escalated and resolved before negative impact to the timeline and budget occur.

The solution architect applies this process and provides quality assurance for each phase of the project.

This ensures that the resulting architecture is meeting the client expectations and requirements, and is technically feasible and achievable. In addition, the deliverables and milestones at the end of each phase of the project are compared to the overall objectives and the objectives and requirements established in each prior phase in the methodology.

A successful data retention solution should exhibit the following characteristics:

- **Customer-centric project management** - The approach/methodology as described above, which ensures a successful, timely, on-budget solution
- **A tiered storage approach** - The solution should incorporate a tiered storage strategy which considers business requirements (service levels and storage attributes), storage classes (the different kinds of data/content), storage policies (which support the business requirements for each storage class), storage architecture (types of storage devices/communities and their standards), and migration plans (to get data and content from here to there, and from tier to tier)
- **RAS disciplines** - The solution must be reliable, available and scalable, not in label or supposition, but in actuality with practical ways to prove it
- **Standards based** - A robust and stable solution is one that is based upon industry standards so that it is sustainable by the client after deployment and able to grow and adapt as needed over time
- **'Passing the torch' training**- The best solution providers leave behind a written deliverable which clearly depicts the solution design, operating processes and procedures, compatibility matrices, best practices, etc. These solution providers will also deliver sufficient knowledge transfer so that the client can make the most of the solution and understands how to operate and scale the solution when needed.

Using Datatrend as an example again, we have created a comprehensive solution based upon the characteristics and disciplines just described. Our Data Retention Solution combines the IBM TotalStorage DR550, which includes the storage hardware and software in a fully integrated bundle, with virtually any content management solution, and the design, integration, and implementation services to get it into production as quickly and cost effectively as possible. We partner with other content manager ISVs and other partners in the value net as necessary, but remain the primary solution provider from the perspective of the customer. We ensure that all the technologies and skills of the value net are brought to bear on behalf of the customer's solution, tailored to their specific needs and requirements, accomplished through an efficient and customer-focused solution design and project management methodology.

Conclusion and Summary

I have attempted to provide a high-level overview of a successful partnering strategy for the deployment of a data retention solution. By partnering with a solution provider who earns the right to be viewed as more than a vendor and who has established a value net of software and hardware industry leaders, you can be assured of developing a successful data retention strategy and a comprehensive solution. Your data retention solution provider should bring together the experience, the technologies, and the integration necessary to ensure there are no loose ends and no doubt across the enterprise about the success of your data retention solution. After all, in this day and age of regulatory compliance and ever-increasing internal scrutiny, your future may depend upon it!

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