



**Company:**  
inStream Solutions

**Industry:**  
Finance

**Line of Business:**  
Software development

**Target Market:**  
Financial advising

**Location:**  
McLean, Virginia

**Summary:**

When launching any new product, all companies want to make sure they start off on the right foot. For inStream Solutions, that's exactly what they were able to do with the Savvis Symphony Virtual Private Data Center (VPDC). Today, the company is able to host its financial planning product suite on an easily scalable, resilient and reliable infrastructure. With the dedicated, proactive customer support it receives from Savvis, inStream Solutions is perfectly positioned for the growth that lies ahead.

## inStream Solutions Launches with Confidence Thanks to Savvis Symphony VPDC

### Overview

An international company with staff in the United States and India, inStream Solutions develops financial planning software to help manage client lifecycles for the financial advising industry. From proactive planning tools and advanced financial calculators to an integrated contact management system, the company offers a robust, cloud-based product designed to help financial advisors serve their clients better. Founded as an entrepreneurial initiative of the financial advising firm McLean Asset Management Corp before being spun off, inStream Solutions is a unique platform created by financial advisors for financial advisors.

### Business Opportunity

Launching inStream Solutions had been a longstanding goal for the company's Chief Executive Officer, Alex Murguia. He had hoped to launch the company on a Software-as-a-Service platform right from the start. So when the time was ripe to move forward with his plans in 2010, Murguia and inStream Solutions' Chief Information Officer Rajeev Dharmapurikar began looking for a cloud services solution to get the product suite into beta testing.

The team created a matrix of core criteria, noting scalability, uptime and performance as key decision factors. Of most importance to Dharmapurikar, however, was the level of support the vendor could provide. "Being a relatively small operation, we don't have the kind of IT muscle that bigger companies have," said Dharmapurikar. "So for us, it was critical to find a company that would provide a supportive relationship and take care of us from a technical perspective."

Initially, the team chose to go with a cloud computing solution from a large mass market cloud provider. "Although this product met our requirements from a features perspective, the vendor did not provide the high level of customer support and service level agreements (SLAs) we needed," explained Dharmapurikar. This led the team to continue its search elsewhere.

## Solution

Murguia and his colleagues at McLean Asset Management were familiar with Savvis, due to an existing relationship they had with the company. "We had been using Savvis managed hosting and colocation services for the past few years," said Carlos Coutin, Director of Advanced Planning at McLean, who works on the inStream side as a program manager as well. "We talked to our Savvis account team about our needs and were happy to find they offered just what we were looking for."

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**- Rajeev Dharmapurikar  
Chief Information Officer  
inStream Solutions**

From enterprise-grade performance and multi-tiered Quality of Service (QoS) levels to high scalability and a user-friendly application programming interface (API), the Savvis Symphony Virtual Private Data Center (VPDC) proved the perfect fit. "Unlike traditional hosted models where you have to buy server capacity in advance, the Savvis VPDC allows us to bring in customers without making a capacity commitment," said Dharmapurikar. "It's a much safer investment and we avoid hardware costs as well."

With a VPDC solution in place, inStream Solutions went from concept to reality.

## Benefits

For Dharmapurikar and Coutin, the Savvis VPDC has been satisfactory on numerous levels, but of greatest value is the superior customer support that Savvis provides. "The interactions I've had with both the technical and sales teams have been nothing short of excellent," said Dharmapurikar. "They've been phenomenal in answering our questions, always being honest and upfront about everything." The SLAs that Savvis offers further allow inStream to launch with confidence.

The Savvis VPDC not only gives Coutin peace of mind, but resonates with tech-savvy clients as well. "When you're having a conversation with a technical person, it does help to say Savvis is hosting our platform," he said. He also notes the benefits of the VPDC from a management perspective: "The Web-based designer interface is very straightforward and easy to use."

Looking ahead, Dharmapurikar is optimistic about inStream Solutions' future with Savvis. "From a customer service point of view, we have nothing but the highest level of satisfaction," he said. "Savvis provides excellent service, and that is not only what we value, but what we strive to provide for our customers as well."

## Future

Although inStream Solutions' immediate goal is to first rollout to the U.S. market, it hopes to launch an international marketing strategy in 2012. Dharmapurikar believes that their Savvis Symphony VPDC will be key in enabling that growth. "As we start to expand our customer base, our infrastructure needs will go up," said Dharmapurikar. "For that, we know we'll be in good hands working with Savvis."

**For more information  
about Savvis, visit  
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