CASE STUDY

A CONFIDENT MOVE TO THE CLOUD: VALERO'S PARTNERSHIP WITH GLOBAL RELAY FOR INFORMATION GOVERNANCE

CUSTOMER PROFILE

Valero Energy Corporation (Valero) is a multinational manufacturer and marketer of petroleum-based and low-carbon liquid transportation fuels. A Fortune 500 company, its mission is to be the best-in-class producer of essential fuels and products that are foundational to modern life.

Headquartered in San Antonio, Texas, Valero is the largest independent petroleum refiner globally, and the world's second largest renewable diesel producer. Its products are sold in the USA, Canada, the UK, Ireland, and Latin America, and approximately 7,000 outlets carry Valero's brand names.

CUSTOMER REQUIREMENTS

Valero has been on a journey of digital transformation for many years, implementing strategies to improve operational efficiency. The organizational experience was that on-premise solutions offered greater security and control.

For the storage of all its electronic communications data, however, the company's on-premise system was no longer fit for purpose in terms of how it needed to capture, retain, access, and manage its data in order to respond to records requests.

"We had 20+ years of email data housed within an archiving platform that we were outgrowing," says Sven Hoerschgens, Senior Manager, Business Systems at Valero. "We knew that we were retaining more data than we needed, but we didn't have the functionality with our current system to apply the rolling deletions that would make system performance better."

For the firm's in-house Legal team in particular, it also meant that performing eDiscovery for records requests or investigations was more time-consuming than necessary. This resulted in a reliance on IT colleagues to extract the required data, a dependency that made the records-gathering process fragmented and drawn-out.

Valero wanted to replicate the agility it had already achieved elsewhere in the business, but as no alternative to the incumbent system could meet its new needs, Valero sought to migrate its communications data off-premise to leverage a cloud solution. It engaged Global Relay to help the business unshackle from restrictive legacy technology, embedding a system that would:

- Process higher volumes of data
- Improve workflows for eDiscovery
- Not retain more data than needed, making records requests easier to manage and execute
- Have a one system approach for the capture and retention of divergent data types

"As a first-time integration at this level, the presence of the Project Management team made a real difference; from evaluation to on-boarding through implementation. The accessibility and knowledge of the team was extremely reassuring."

Sven Hoerschgens, Senior Manager, Business Systems, Valero

GLOBAL RELAY SOLUTION

Valero chose Global Relay's cloud-hosted archiving solution to consolidate electronic communications across email and its other key channels into a single platform, while streamlining records management workflows.

Global Relay Archive automatically captures, indexes, and preserves every communications record in one repository, with integrated, customizable access that now puts Valero's Legal team in control of its own eDiscovery. Ready access to a unified data set enables eDiscovery users to perform highly granular, yet rapid searches across millions of records to find exactly what's needed at pace.

The ability to apply legal holds at the point of capture means that retention can now be done automatically and in just a few clicks, within a single system for legal holds, archiving, and eDiscovery. While Hoerschgens and his team knew that moving off-premise to a cloud-hosted solution was right for its future records management needs, they understandably had to satisfy stringent criteria in terms of data security.

Global Relay rose to these standards, providing Valero's VP of Systems Infrastructure with direct access to its Chief Information Security Officer to go through a comprehensive security 'inventory' (including SOC 2 audits, ISO 27001 certification, and cybersecurity and data protection protocols) to give Valero's IT leaders the required confidence.

As a company committed to innovation, Valero's confidence was reinforced by Global Relay's extensive list of connectors, that can rapidly capture new and diverse data types seamlessly and securely.

For the cloud deployment, a dedicated Global Relay Project Management team oversaw every facet of the migration; including live data feed integration, historical data transfer, training, and ongoing account management.

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THE OUTCOME

Global Relay Archive represents Valero's first major cloud deployment for information governance, and levels of satisfaction with performance for search and applying legal holds through the system are already high. With instant access to search-ready data, its Legal team are prepared for any scenario, without the need for IT support.

"In terms of how it helps us manage our electronic communications and eDiscovery process, it is night and day compared with where we were previously," says Hoerschgens.

• Response times for records requests are drastically improved
• Saved IT time and resource
• A single view of legal holds facilitating more confident disposition of data
• Consolidating capture and retention of divergent data types (within a single system)
• The ability to create secure workspaces for confidential data

Valero is now operating a system that outperforms its predecessor and positions the firm above many of its peers in terms of its data governance procedures and investigation response, should these functionalities be required.

Finally, it also provides a system that can truly scale with the company as it continues its digital journey, with the ability to extend data capture at any time to support new communications channels. In an evolving digital and regulatory landscape, this helps to futureproof Valero for any forthcoming recordkeeping and associated reporting requirements. "We know it can meet needs we don't know we have yet," says Hoerschgens.

LOOKING FOR A COMPREHENSIVE AND DEPENDABLE ELECTRONIC RECORDS MANAGEMENT SOLUTION?

Global Relay provides cloud-based archiving, information governance, surveillance, eDiscovery, and messaging solutions to over 20,000 organizations in financial services, energy, government, healthcare, retail, media, and more. Global Relay enables you to manage, control, and profit from your electronic communications data.

CONNECT
Connect your electronic communications, voice, social media, trade, and legacy data, and deliver it to your Global Relay Archive or wherever you need it.

COLLABORATE
Chat compliantly with your customers, colleagues, and industry peers via text, voice, WhatsApp, video, or instant message.

Available on iOS, Android, and desktop.

DISCOVER
Enrich, store, manage, and discover your data – all in one system.
• Compliant storage
• Dynamic policies
• Team workspaces
• Real-time AI
• Custom workflows
• Collaboration tools

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