tds
Accelerating IT Transformation

CASE STUDY

Financial Services Industry

Disaster Recovery

Global Investment Firm Identifies a New, Efficient and Scalable Process for Building a Resilient DR Program on AWS

More and more financial service organizations are adopting the cloud to deliver innovation, customization and security and give them a unique competitive advantage.

As they strive to keep pace with market needs, they must adapt more innovative technology, which may necessitate the move from their current data center to the cloud or because they want to take advantage of new technologies that are available if they move to the cloud. This move to the cloud promises to reduce capex spend, decrease complexity in IT management and improve security and agility.

However, as these companies digitally transform their IT they often find new challenges around the planning of how to operate in their new state and how to best leverage the new technologies now available to them.

One privately owned investment management firm recently sought a solution that would enable them to maintain their robust and efficient systems while supporting performance needs. With a strong business case in place to migrate to AWS to reduce capex spend and enable innovation, the firm needed to be able to obtain the same level of resiliency and failover procedures while in the AWS Cloud.

The firm looked to accomplish this with AWS's native DR platform, CloudEndure. With 15-minute RPOs for their Tier1 applications, the team would require continuous replication with failover services for near-100% application and data availability.

Although AWS CloudEndure could achieve the RPO requirements from a server-level cutover, their SLAs extended up to the application level to a full business service recovery.

This required orchestration and automation beyond the server to eliminate manual steps in the process which introduced risk and could exceed the RTO.

TDS was identified as a partner because of its expertise and the power of its TransitionManager platform to unify and streamline the AWS/CloudEndure toolchain.

In fact, TransitionManager, a powerful orchestration platform from TDS, is built to integrate with native and third-party tools, including AWS's CloudEndure, to reduce the complexity of DR, and turn it into an easy, "one-click" process, minimizing the time and risk normally involved.

TransitionManager leverages integration to create an automated recovery toolchain and fill existing gaps in the recovery process by unifying and automating tools, process and systems across IT. TransitionManager enables IT to accelerate and de-risk every step of recovery planning and execution.

Cybersecurity Concerns

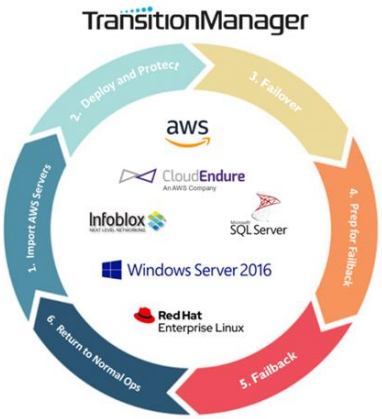
An article by ITSP Magazine says, "Financial services firms fall victim to cybersecurity attacks 300 times more frequently than businesses in other industries."

And to make it worse, ransomware costs skyrocketed to over $7.5 billion in 2019. Threats from malware, social engineering, and various cyberattacks are ever present.

The need for bullet-proof data protection has never been greater.

But there are dozens of options in the realm of backup and disaster recovery. And, with the risks so high, choosing the wrong solution can result in a crippling data loss.

Choosing well can give IT leaders the ability to manage change even if it is unexpected -- and give them the peace of mind from knowing they're covered and can truly serve as an agile IT platform for the business.



How It Works

1. Automated discovery of EC2 instances as they are added to source location
2. Automated 1-click bulk deployment of Linux/Windows agents, monitoring of data protection status
3. Full failover orchestration of roles and tools, DNS updates, app and database health checks, Windows route table change tracking
4. Automated CloudEndure replication switching and discovery of new CloudEndure machine IDs
5. Full failback orchestration of all roles and tools to source region
6. Automated project replication switching & discovery of CloudEndure Machine IDs to normal operation

The Results – Improved Efficiency, Reduced Risk

TDS worked with the customer and the AWS CloudEndure team to ensure DR functionality as a prerequisite for moving to the cloud. The firm required a fully automated failover architecture ensuring protection of their Tier 1 applications across AWS regions while achieving their required SLAs.

This automation created a framework which would enable them to seamlessly add servers to the failover automation workstream as they continue to migrate additional workloads to AWS.

TDS and the customer team leveraged TransitionManager to orchestrate every phase of the project, from discovery of the environment, analysis and planning, failover testing, full failover and failback. Accomplishing this functionality allows the firm to benefit from:

- 90% reduction in labor with automated setup of migration transport tools
- 98% reduction of manual entry errors
- 50% reduction in number of resources (often highly skilled, highly paid)
- 38% reduction in technical labor costs, reduce manual steps from 20 to 2
- 50%–70% more workloads migrated
- 85% reduction in event execution time

With TransitionManager enabling the orchestration of CloudEndure, DR testing and failover operations were automated without affecting primary systems, which drastically reduced the cost, operational impact, and staffing requirements typically required in DR efforts.

They were able to view through a single pane of glass and make collaborative decisions through a single automation portal for all the required tools in the process. This automated connectivity between teams and tools enabled an accelerated, repeatable process, moving more workloads to move faster.

The new process introduced major efficiencies by eliminating manual input and the associated errors and redo's that go along with it. It streamlined the hand offs between teams and tools into one unified, intelligence-driven toolchain.

TDS created a baseline framework that brought the firm to the operating model they needed to be as well as enabled them to scale and be more nimble as they grow and improve operations in AWS.

Learn More about TransitionManager's Powerful DR Automation Engine

TransitionManager was built to help IT practitioners efficiently plan and eliminate risk when executing change in complex, mixed-vendor, cross-silo environments. It aggregates the disparate sources of information across IT into a single, accurate, actionable set of data, and presents it visually in an interactive map. This makes it easy to understand application dependencies across hybrid environments, enabling IT to build and maintain always accurate recovery plans. All members of a project team have a consistent view of real-time data, driving more accurate planning.

As an orchestration platform, TransitionManager easily integrates with existing tools across IT, to coordinate the flow of data and the execution of human and automated tasks. Audit trails provide proof points to confirm the ability to meet uptime requirements and protect critical information. Regenerating runbooks ensures they always reflect the current environment.

TDS has been helping organizations plan for and manage complex change since 2002 and we built the only software platform that is specifically designed to accelerate, simplify, and orchestrate any IT transformation process – and eliminate risk in execution.
Contact us today to discuss how we can help your organization prepare and recover quickly from whatever comes next.

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