

CASE STUDY

Banking Industry

3 minute read

Large regional bank tackles the reshaping of its IT infrastructure



Data Center Migration



SUMMARY

- A regional bank based in the South needed to move out of an outdated data center to reduce costs and begin to modernize their infrastructure
- A pilot program demonstrated the benefits of a thorough methodology for discovery and analysis
- The analysis helped update and ensure an accurate picture of their disparate application landscape – critical to making migration decisions
- The bank was able to build an optimal, accurate schedule and migration plan for the full set of assets across their IT environment

Here's how we helped the IT team organize and orchestrate a migration strategy for their data center.

The bank needed to vacate an outdated and under-utilized data center in an effort to reduce costs. Our role initially was to conduct a pilot discovery process to assess a subset of the client's environment, demonstrate our methodology and create the migration strategy for the full project.

Looking at the data collected through the lens of TransitionManager, the pilot quickly showed the bank's IT team the value of the TDS discovery and analysis process.

A successful discovery phase consolidates information from multiple available sources of information with focus on quality and speed. As with any data aggregation initiative, the information must be normalized, validated and transformed into an actionable “vault of truth” to allow for predictable change management.

For the pilot, the TDS team inventoried physical assets and then used TransitionManager to ingest the application data. The data was then normalized and analyzed through both automated features of the software platform and brief, informative interviews with the application subject matter

experts (SMEs).

Exposing new information about legacy applications

Looking at the data collected through the lens of TransitionManager, the pilot quickly showed the bank's IT team the value of the TDS discovery and analysis process. The rich visualization tools in TransitionManager revealed every known data point, application, server, etc. as well as – and this is vital – how they are interdependent.

As expected, it provided clear visibility into the inner workings and dependencies of all of the applications. The SME interviews were key to ensuring the accuracy of the application status, as many were found to be out of date.

Once the pilot project was complete, TDS worked with the IT team to build an accurate schedule and migration plan for the full set of assets across their IT environment. Six migration events were planned over the course of seven months.

Orchestrating the move events

With a trusted source of data and migration methods established, TDS started to work with the Bank to establish bundling criteria for how the migration waves would be constructed. The team turned to the dependency analyzer feature in TransitionManager, dynamically modeling the different move groups using the tool to automatically highlight dependency issues that each wave scenario created.

Working through different options in TransitionManager, application and infrastructure components were re-distributed to more evenly balance move groups based upon

identification of viable soft dependency breaks such as acceptable application latency, batch processes and file transfer dependencies.

In parallel to the application dependency analysis, TDS worked with the bank's technology team to develop low-level technical runbooks, automation scripts and methods. TDS then worked with the bank through a conceptual design of the proper steps and task sequences required for the migration events based on TDS best practice templates and tailored to the bank's requirements.

After receiving an approved migration plan, TDS developed the "Recipes" or custom scripts in TransitionManager used to auto-generate the pre-migration (T-minus), execution and post-migration (T-plus) runbooks. TDS reviewed event runbooks with the team during well attended tabletop review sessions for each event, validating the tasks sequence, ownership, and more importantly fine tuning the duration of these tasks to be able to confidently predict the time required for application migrations.

Next Steps

As the migration plan moves into full execution, the bank now has full confidence that they will migrate their entire IT environment with no unplanned downtime or impact to the business or customers. The project will produce cost savings from the move out of the under-utilized data center as well as next generation network, compute and storage infrastructure.

TDS has been helping organizations plan for and manage complex change for over 17 years 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 recovery quickly from whatever comes next.

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