



Case Study

Fortune 500 Investment Company Gets Data Center Transformation Project Out of the Red

The client

Formed more than 20 years ago, the client is a Fortune 500® investment company that serves nearly 14 million individual customers and 50,000 institutional clients. The company services or manages more than \$600 billion.

The challenge: Expedite migration planning after another provider dropped the ball

After many months of waiting for their contracted services provider to help them move into managed facilities, and thousands of dollars wasted, the client began looking for other resources. The transition was part of a larger plan to save \$300 million in overhead and get out of data center management. This would also allow the firm to refocus their internal resources on more strategic activities and the development of new service offerings.

Industry:

Financial services

CDCT provided:

- Workload discovery and assessment
- Extensive planning for zero-downtime migration
- Discovery using the SnapStart engine
- Networking, security, and AD servicing

CDCT services:

- Consulting Services
- Migration Services
- Professional Services

The solution: Discovery, migration plans, and network remediation to get things back on track

The client met with the services delivery team at Insight Cloud + Data Center Transformation (CDCT), learned about our methodology and resources, and determined that they could entrust us to get the project truly off the ground.

Because the client offers trading and financial services, they cannot afford downtime. Between this factor and the time-sensitive nature of the project, we opted to perform the initial discovery using our SnapStart discovery engine, which can accelerate the scanning and analysis of an IT environment by 10–20 times.

Based on what we found in the discovery process, we helped the client:



Remediate workloads to prepare for migration



Decommission aging or failing components



Address governance and bundling for migration



Build runbooks and execute a migration into a hurricane-hardened facility with adequate power to support continued business growth

The client's IT system had nearly 15,000 outdated firewall rules that needed to be reviewed. We've also supported them with their Active Directory® (AD) as part of their transition. They also wanted to move to Palo Alto Networks® infrastructure, and requested our assistance to design a new, secure network architecture that would provide operational improvements.

The benefits: Reduced costs, improved security — and peace of mind

Prior to working with us, the client had effectively been stood up by a provider with whom they had a five-year contract. CDCT helped the client make up for lost time, get the project back on the rails, and remediate critical issues.

The client is now beginning to realize expected benefits: cost reductions for IT operations, enhanced security to protect sensitive customer data, and reduced risk of outages and data loss. They are also experiencing an unintended benefit: a new strategic partnership with trusted provider, CDCT.

Since working with us, the client has brought all of their networking and security teams back in-house and pulled back from their existing contracted service provider. We will continue to consult and support the client throughout additional phases of this initiative.

Benefits:

- More secure customer data (401(k), etc.)
- Reduced IT operational costs

Discovery and assessment of

7,000+ servers and

1,400+ apps



Risk-mitigated migration with **zero downtime**

Modernized networking architecture



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