

## CASE STUDY

# Financial Services Firm with 1200+ Locations Migrates to AWS



### Challenge

To vacate on-prem data center and migrate workloads to AWS before hardware contracts expired.

### Solution

The financial services firm engaged their IT outsourcing services provider to support the migration. This partner then engaged WSM International to bring public cloud migration expertise to ensure on-time completion and reduced risk.

### AWS Services Implemented

- EC2
- EDS
- Load Balancing
- Control Tower
- S3 Storage
- Lambda
- RDS
- AWS SFTP
- AWS SSP
- VPC
- Direct Connect
- CloudTrail

### Results

- Project completed in December 2019 – on time and on budget
- AWS instances optimized and configured for PCI DSS compliance and cost-effectiveness
- Internal Cloud Center of Excellence established for ongoing governance

This privately owned financial services firm is one of the nation's largest title-lending companies with over 1,200 retail locations. To modernize their IT infrastructure and restructure costs, they decided it was time to shut down their on-premises data center and move to the cloud.

### Challenge

The firm operated a data center for its primary business applications and customer-facing workloads. Because hardware contracts were expiring, the leadership decided it was time to make the move to AWS. They called on their IT provider for guidance, and their provider called on WSM for migration planning and migration delivery services.

According to the firm's Chief Financial Officer, "We help thousands of people every day to get the cash they need. We trusted our current provider to bring the right relationships to ensure a secure cloud design and cloud migration and they delivered. This was one of the best projects that I have ever seen."

### Solution

Time was of the essence as the migration needed to be complete before hardware contracts were renewed. To help them meet the deadline, their IT provider called on WSM International, a Connectria company, because of WSM's industry-leading migration experience and because WSM had recently delivered a Cloud Center of Excellence consulting engagement for the financial services firm on the provider's behalf.



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“This provider could have their choice of partners to work with,” said Tina Wisbiski, WSM’s Project Management Lead for Cloud Migrations. “We’re proud to be a partner they can rely on when they need additional support for their cloud migration projects.”

WSM worked with the IT provider and the financial services firm’s project leads to migrate workloads from more than 140 servers to AWS. “The organization has a very complex network and the project took very detailed planning and orchestration across a number of departments,” said Wisbiski. “In some cases, the client hadn’t documented what was on each server, so we had to spend time, upfront, finding business owners for the different workloads. In addition, we had to coordinate our efforts with the work that their IT provider was doing for the client as well.”

### Results

Completed in early December of 2019, the migration took four months from start to finish – and was finished before the hardware contracts expired. AWS VPCs were built from the ground up to comply with PCI DSS and cost-optimized through the use of AWS cloud services such as RDS and EC2.

To help the organization manage its cloud infrastructure, WSM also helped the firm create a Cloud Center of Excellence (CCOE). This internal, cross-functional team will be responsible for the ongoing management of the cloud strategy, governance, and adoption.



### Why Choose WSM & Connectria?

A leader in migration and cloud adoption, WSM delivers solutions designed to meet your needs for greater business agility, better efficiencies, and increased return on investment.

Connectria provides managed cloud, managed services, and compliant cloud security solutions to more than 1,000 global customers delivering technology-agnostic solutions consistently, with depth and breadth of engineering expertise, scalable solutions, and speed to market.



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