



Case Study

Financial Services Firm Plans for DR in Azure

The client

For more than a decade, the client has provided financial planning and investment management services to individuals and businesses. The firm is based in the Southeast U.S. and operates as an independent practice led by a lean staff with nearly 100 years of cumulative financial services experience.

The challenge: Enhance and modernize DR strategy by evaluating cloud as an alternative

For a financial services provider, quick and complete recovery in the event of a disaster or failure is critical. The client was concerned about the reliability of their existing Disaster Recovery (DR) systems, in light of business continuity needs and customer expectations.

To improve their DR, the client was interested in using the cloud as a DR target. Specifically, they wanted to identify the feasibility, expected costs, and opportunities for leveraging Microsoft® Azure® cloud resources for DR.

Industry:

Financial services

Insight provided:

- Expert guidance around Disaster Recovery (DR) strategy
- Brief assessment and migration of non-production workloads, databases, and VMs to Microsoft Azure
- DR in Azure Proof of Concepts for eight of the client's platforms
- Comprehensive deliverables providing analysis and recommendations

Insight services:

- Consulting Services
- Professional Services

The solution: Customized PoCs for 8 platforms, with in-depth testing and modeling

The client engaged Insight to conduct a Proof of Concept (PoC) for the purposes of testing a variety of use cases surrounding Azure® as a DR target for their workloads. The overarching goal was to implement and test as many of the client's use cases for DR in Azure as possible, and to document any findings from the tests to aid in future Azure deployments.

Our team set to work providing PoCs for not one, but all eight of the client's platforms, including NetApp®, Dell EMC®, and Citrix® infrastructure, and several virtual machines and clusters. This included migrating four SQL Server instances and several Windows Server VMs from the client's DR environment to rehost them in Azure. After an initial assessment and migrations, we comprehensively evaluated workloads for their compatibility of moving DR to Azure, performed test failovers, and provided financial models in each instance.

The benefits: Hard data and expert direction for successfully moving DR to Azure

By performing PoCs, the client was able to clearly see what would happen and what they could achieve by moving DR to the cloud without incurring any risk in the process.

PoC deliverables included diagrams and observations for each use case tested, as-tested configurations, test results, sign-off records, and recommendations for future implementation — essentially, a roadmap for moving DR to Azure. If and when the company opts to go that route, the PoCs demonstrated that they would realize significant cost savings and other benefits, over their current architecture.

Benefits:

Evaluated option of moving DR to the cloud without risk or interruptions



Gained understanding from PoCs for 8 platforms across the client environment

Ensured data accessibility in the event of an outage through successful SQL migration



Received actionable insights to address each identified use case

Identified a path forward to DR in Azure, for cost savings and other benefits

