5 Steps to a Successful Cloud Journey

Insight
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Overview

Incessant data growth. Rising IT costs. The need for greater agility. These are just a few of the reasons many organizations have turned to “the cloud.” But, there are many questions to consider in a move to cloud: Which application workloads are best-suited to move? What’s the best way to move them? What about security and compliance in the cloud? How can you make the move to cloud with the least risk to your organization, its customers, partners, and employees?

Without careful consideration of these questions as you begin your cloud journey, success is not assured. This guide offers a brief roadmap to help increase the odds for success in achieving the promise of cloud.

The cloud’s bright promise:

- Infinite scale and automation to grow applications up or out as needed
- Opportunity to innovate and “fail fast” with new applications
- Cost savings (with more measurable, monthly OpEx costs)
Heed expert advice

Insight SVP and GM, Shawn O’Grady, shares more about what stops IT organizations from moving to cloud — and what they can do about it.

Proceed with caution

According to the results of a 2018 IDG Research Survey, many IT organizations experience several, unexpected “bumps” in their road to cloud. The survey, commissioned by Insight, looked at efforts of 200 IT professionals to incorporate cloud services in their own IT transformation. Here are some of the challenges reported.

- **72% of IT leaders struggled** to document and communicate a cloud strategy in their organization.
- **Outdated legacy systems and technology silos** were cited as two of the top five barriers to IT transformation.
- **51% of IT transformation initiatives stalled or abandoned** due to challenges encountered while undertaking these projects.

Such challenges need to be addressed prior to implementing a strategy. Organizations who do so will enjoy the cloud’s bright promise.

This guide highlights a better way forward that has worked well for many organizations. In the following pages, you’ll find five key steps to ensure greater cloud success.

Note: These steps need not always be followed sequentially. Some may overlap while others may be shortened, altered, or streamlined to accommodate each organization’s unique schedule and priorities.
STEP 1:
How “cloud-ready” is your organization?

Much of cloud success comes from the initial groundwork laid during these first few phases of assessment and planning. This first step involves assessing how ready your organization is for a move to cloud. It takes a very close look at current IT operations, current processes, and people. Sample questions here include:

- How do you control and manage current IT costs? How will that translate to cloud?
- What skills or training are needed to support new cloud roles?
- How does the business currently use its applications?
- What levels of security and compliance do you need in the cloud?
- What types of identity management and access controls are needed for cloud?

Cloud Envisioning Workshop
Create a vision for your organization’s successful journey in leveraging a cloud platform.
STEP 2: How “cloud-ready” are your applications?

This second phase looks closely at how ready your applications are for a move to cloud. But it doesn’t just stop at applications. It looks carefully at the needs of application workloads. A workload represents an application and any upstream or downstream dependencies an application requires to operate successfully.

A workload may involve certain compute, network, or storage needs. It can require one or more databases. It might even involve other, interconnected applications. This is where you start to determine “which workload goes where” regarding cloud. This is not always an easy task.

On average, Insight’s survey found only 42% of an organization’s current applications are optimized to support cloud storage consumption.

At this second phase, it’s critical to ask questions like:

+ What does this application depend on to operate? What base metrics can I collect to learn more? How much does this application workload cost to run now?

+ If this workload moved to a public cloud, how often would users need to send data to it (or, more importantly, receive data from it)? How much data? How does that translate into cloud ingress/egress charges?

+ What “cloud-to-on-premises” connectivity options and performance levels are needed for this workload in the cloud?

Answers to these questions help you prioritize which application workloads are more cloud-ready than others. It can also help determine any cost investments toward application modernization or optimization that may be required before certain legacy workloads can succeed in the cloud. You may find some workloads better-suited for hybrid cloud or continued, on-premises operations — at least for the short term.

Moving Workloads to the Public Cloud? Don’t Forget About Security.
Learn how to secure your data in the cloud with this whitepaper.
Moving workloads: Who, what, where, when . . .

It’s important to ask the right questions when deciding which workloads should go where. A good start is the reporter’s fact-finding mantra:

Who?
Who currently uses this application workload?

What?
What upstream/downstream dependencies does the workload have with other hardware or software?

Where?
Where do the workload’s components currently reside (physical servers, VMs, etc.)? Where (as in the specific cloud provider and service) do you plan to move it?

When?
When did you hope this workload could be migrated to the cloud?

Why?
Why is this workload a good candidate for the cloud? Conversely, why is it NOT a good candidate? Why does a specific cloud provider offer the best fit for this workload?

How?
How, more specifically, do you plan to move this workload?

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Pro tip:

When moving to the cloud, don’t just do the bare minimum.

Hasty “lift-and-shift” moves to the cloud lead to unexpected charges if you estimate your resource requirements incorrectly. It can also be quite costly to retrofit later if problems arise. Take time to plan necessary workload resources accordingly before moving them to the cloud. Similarly, plan an extra buffer of cloud resources per workload for unexpected peaks in use.
STEP 3:
Time to design and build your cloud

This phase takes all of the data and findings you’ve amassed and develops a detailed action plan to move forward with the cloud. Take the time to work out the details here. Done properly, these plans will serve as a critical roadmap to guide you smoothly toward success with cloud services. At this stage, you will actively:

- Architect a cloud-based design that aligns with your business objectives.
- Identify and start to incorporate any needs for cloud backup or disaster recovery.
- Outline a viable hybrid cloud migration strategy, where needed.
- Evaluate and start to select key cloud providers and services.
- Start setting up the foundation of cloud services. This may involve starting to build sites or setting up and exploring subscription accounts and how they can be managed.
- Start implementing appropriate storage, compute, and connectivity options.
- Implement any necessary services based on Platform as a Service (PaaS) or Software as a Service (SaaS) cloud service models.
- Start to document and communicate cloud plans, in detail, for both current and future workloads.

Choosing Between Private and Public Clouds: How to Defend Which Workload Goes Where

Learn how to advance from where you are now to where you need to be.
STEP 4: Make a trial run

By this point, you should have done much of the initial groundwork. Now, it’s time to try out your plan and kick some tires. Two core activities are typically involved in this stage: Proof of concept (POC) and migration of non-production workloads.

The POC stage

This is the perfect time to try one or more proofs of concept. Want to see how one cloud management platform (CMP) compares to another? What about how a few, sample virtual machine workloads work in the public cloud? You might want to explore how a cloud-based Database as a Service (DBaaS) platform like Microsoft® Azure® SQL could support workloads in contrast to your on-premises SQL-based environment. This is the perfect time to try things out. At the POC stage, you can start to:

- Build and test processes (prior to building all regions and services)
- Deploy representative workloads
- Assess for any added costs or capabilities
- Validate functionalities
- Start answering other questions, such as how to integrate logging systems or some ways to manage consumption of cloud-based services

Innovation & IT Transformation for Tech Provider to Financial Services

Learn how we helped a technology provider embark on a cloud and data center transformation.
Migrating non-production workloads

This is where you start to actively migrate a good portion of your identified, non-production application workloads to the cloud. This is the chance for a better mock-run to see how production workloads might run in the cloud.

For bigger organizations with several hundred (or even several thousand) workloads, this process often occurs in phases. Phase 1, for instance, might involve migrating only certain identified workloads, move groups, and processes. This includes migrating or replicating any data needed to support the workloads. Included is also deployment of important backup and disaster recovery processes to support the migration.

More exploratory questions often crop up here as well, such as:

+ How will all those virtual machines be logged in my change management database system (CMDB)?
+ How will my support team manage these workloads?
+ If something crashes, how will logs be sent to a centralized logging system?
+ How should we update support-related documentation, service catalogs, runbooks, or support contact information to reflect services now running in the cloud?
+ How should we rethink SLAs when workloads are in the cloud?
+ How are the workloads performing? How are cloud resources being used?
+ What adjustments can we make to better control, manage, or optimize workloads for security, governance, and cost?

Pro tip:

Cloud migration for the risk-averse and the risk-takers.

Many clients prefer to go gradually to the cloud by first migrating manageable clusters of low-risk, non-production workloads, and then making adjustments as they go. A few others are willing to take more risk — they may choose to migrate as much as thousands of workloads on a more aggressive timeline. The choice depends on how much risk you are willing to incur.
**STEP 5:**
**Going live**

All steps leading to this point have prepared you to now go live and migrate targeted production data and workloads to the cloud. By this stage, you should have a good handle on new roles and who has them, and how workloads will be secured, managed, and supported. Testing and validation are still required here, just as you did when migrating non-production workloads.

In case there are challenges or sudden changes in move schedules, established migration runbooks with rollback procedures should also be available for all parties involved in the migration.

Here as well, you will be:

- Establishing move groups and processes
- Testing and validating
- Migrating or replicating workload data
- Migrating applications based upon earlier, successful migrations with non-production workloads

By doing the earlier planning and migration groundwork with non-production workloads, you should have higher confidence that this step of going live should go smoothly.
Conclusion

IT transformation is a complex journey. Effectively navigating cloud is a key component and preparation is paramount. Taking the time to ensure cloud readiness — in terms of your organization and your applications — and build a cloud model that accounts for unique business requirements and goals will improve your chances of success.

Insight has extensive experience helping IT leaders prepare for cloud, migrate to it, and optimize operations to achieve intended outcomes. This guide represents just a small sample of the expertise we bring to our work with clients.

Explore the resources included in the previous pages to learn more about our approach to cloud and the results we’ve attained:

- Solution brief: Cloud Envisioning Workshop
- Whitepaper: Choosing Between Private and Public Cloud: How to Defend Which Workload Goes Where
- Case studies: Four Successful Cloud Migration Stories
Meaningful solutions driving business outcomes

We help our clients modernize and secure critical platforms to transform IT. We believe data is a key driver, hybrid models are accelerators, and secure networks are well integrated. Our end-to-end services empower companies to effectively leverage technology solutions to overcome challenges, support growth and innovation, reduce risk, and transform the business.

Capitalizing on the cloud starts with a simple conversation. Let’s discuss your cloud journey and how we can help you advance. Contact us today to get started.

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