

RE-PLATFORMING A MISSION-CRITICAL APPLICATION

Trexin led the effort to upgrade the US + Canada policy management systems for a large financial services firm.

BUSINESS DRIVER

For years Microsoft Windows Server 2003 had been the cornerstone of our Client’s operating environment for mission-critical systems, including two of the largest, most important applications in their portfolio – the US and Canada policy management systems. In 2015 Microsoft ended standard support for this legacy operating system (OS). As costs for extended support began to mount, the business case for upgrading to a more modern OS grew. Moreover, the company was in the midst of a major data center consolidation to a private cloud infrastructure involving assets across the Americas. To successfully realize the benefits of upgrading the policy management system platforms and eventually migrating to the new data center, the company turned to Trexin to lead the effort.

APPROACH

Initially, Trexin’s role on the project was just to establish the correct governance structure, which was deemed important because the effort was beyond the standard application development activities and required engagement across many more functional partners than normal. Trexin worked with our project sponsor to involve the correct participants and established status reporting cadences that crossed the broad audience of application, infrastructure and business partners.

As the project progressed, Trexin assumed a more extensive role with delivery accountability driving the day-to-day activities of the large, multi-vendor team. Due to the shifting corporate environment and inevitable gremlins of legacy platform complexity, the project required repeated schedule-crashing exercises focused on delivering the project as soon as possible to clear the way for dependent activities. Trexin led the team through these exercises, gaining alignment across the breadth of stakeholders. And as the team approached the end of testing cycles and began preparing for the cutover, Trexin led a war-room approach to ensure clear communication, regular progress towards goals and adaptability as issues arose. This approach was critical to ensuring alignment among a geographically and functionally widespread team.

RESULTS

The policy management systems were successfully re-platformed to a modern fully supported OS, paving the way for the next steps of the data center consolidation effort. And the cutover to the new environment was seamless to the users, having no impact to business operations. Trexin also provided advice for the next stage of the data center consolidation, gained through multiple retrospective sessions and team surveys. Our recommendations included: Engaging correct cross-functional teams early, viewing technology as products not just projects, understanding the tradeoffs of regular schedule crash exercises and emphasizing flexible communication over detailed planning at later project stages. As a testament to Trexin’s value, our Client asked us to stay and help lead the broader data center consolidation effort.

Upgrading to a Modern Operating System Paves the Way for Next Steps



Our Client, a large financial services firm, had outgrown their operating system (OS) and required a business case for upgrading to a more modern system. In addition, our Client was also in the middle of a major data center consolidation, which had to be taken into consideration.

Expanding Trexin’s Role

- Trexin’s initial role was to establish the correct governance structure through involving the appropriate participants and reporting structure
- Later, Trexin assumed a more extensive role driving day-to-day activities of the team



Trexin led repeated schedule-crashing exercises to:

- Gain alignment across stakeholders
- Provide clear communication
- Ensure progress towards goals
- Adapt to issues as they arose

Seamless Transition to New Environment

Our Client’s old policy management systems were successfully re-platformed to a new modern OS. Trexin also provided advice for the data center consolidation, and as a testament to the value provided, was asked to stay and help with this effort.



CONTACT US

Financial Services Practice
fs@trexin.com
www.trexin.com