Finserv provider accelerates failover with automation

Industry

Financial services

Size

200,000+ employees

A large financial services provider decided to use automation to strengthen its disaster recovery (DR) plans. It partnered with Red Hat Services to provide training and guidance on DevOps and automation, and to create a repeatable framework to keep the project on track. The team also integrated Red Hat Ansible Automation Platform with the DR system, speeding up failover by around 70%. After a two-year engagement, the company had faster DR with fewer manual touchpoints, effective documentation to demonstrate compliance, and greater in-house knowledge and proficiency.

Software and services

Red Hat® Ansible® Automation Platform

Red Hat Consulting

Red Hat Training

Red Hat Learning Subscription

Benefits

▸ Strengthened disaster recovery

▸ Simplified audit and compliance

▸ Embedded best practices and new skills

Red Hat Innovators in the Open

About Red Hat Innovators in the Open

Innovation is the core of open source. Red Hat customers use open source technologies to change not only their own organizations, but also entire industries and markets. Red Hat Innovators in the Open proudly showcases how our customers use enterprise open source solutions to solve their toughest business challenges. Want to share your story? Learn more.

Strengthening disaster recovery and demonstrating compliance

In the heavily regulated financial services sector, security and compliance are paramount. Organizations don't just need to assure their customers that their data is secure, they need to actively demonstrate it to regulatory bodies.

One of the major players in the North American financial services industry launched a project to strengthen its DR plans. The company wanted to integrate its internal DR solution with an automation platform to become more efficient, and to demonstrate its more resilient systems to regulators.

However, the company needed a partner with the expertise to progress the project. A year after choosing a vendor that had put forward the most competitively priced proposal, the project stalled. The financial services provider then restarted the process of looking for a new partner—one with both the right automation platform and the best professional services team to get the project back on track.

Adopting automation and more efficient development practices

The financial services company had a strong existing relationship with Red Hat, having used Red Hat technologies and Red Hat Services on previous projects. It therefore felt confident reaching out to Red Hat as a trusted partner when a third-party partner failed in its objectives. It started a new engagement with Red Hat Services to implement Ansible Automation Platform and guide the business through its DevOps adoption.

Red Hat Services had already scoped the project as part of the original proposal, so it kicked off with an architecture review to determine the technical requirements. Red Hat then worked with infrastructure teams to define a list of systems that needed to be integrated, along with processes that could be automated. Red Hat Consulting stayed close to the team throughout the project, setting task-orientated goals to keep the project on schedule.

Red Hat Consulting integrated Ansible Automation Platform with the organization's DR system and used playbooks to automate manual tasks, developing a new, highly tailored governance model and methodology framework to help the company achieve compliance, reduce risks, and free up the IT team to focus on more strategic tasks.

Red Hat also provided consultancy and mentorship to embed DevOps and best practices within the financial services company's IT team, coaching it on the use of roles, variables, and collections with Ansible Automation Platform. The company used its Red Hat Learning Subscription (RHLS) to discover more about testing frameworks and code, while Red Hat created documentation throughout the project for the team to refer to in the future.

Creating greater resilience

Strengthened disaster recovery

By automating the infrastructure configuration changes involved in failover, the process is now around 70% faster. This makes DR more efficient and resilient and improves the downstream customer experience. Staff also no longer need to switch between multiple systems; they have a single interface and can trigger automated workflows in a single, simple step.

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Simplified audit and compliance

The financial services company can present documents to outline its DR framework to regulators and provide a clear audit trail of the steps involved in failover. It's a highly effective process that also simplifies the meeting of compliance requirements.

Embedded best practices and new skills

The financial service provider's IT team has learned new technical skills and knowledge of Ansible Automation Platform, DevOps, and best practices around code development, testing, frameworks, and software development. Employees can also follow the standard framework and guidance for future projects to keep them on track and identify how to prioritize tasks. As the company is currently in the process of exiting its datacenter, this will help to migrate thousands of apps in a structured and efficient way.

Expanding automation across the enterprise

With support from Red Hat Services, the financial service company is in a much stronger position to expand automation across the enterprise. The success of the DR automation project was a high-profile initiative within the company and demonstrates the productivity and efficiency gains teams can achieve with automation—even when dealing with the critical systems behind business continuity.

The financial services provider is currently working on numerous other engagements with Red Hat as its trusted partner and expanding its use of automation to increase efficiency across the business. It's also moving more workloads onto Red Hat OpenShift and exploring virtualization.

About Red Hat

Red Hat is the world's leading provider of enterprise open source software solutions, using a community-powered approach to deliver reliable and high-performing Linux, hybrid cloud, container, and Kubernetes technologies. Red Hat helps customers develop cloud-native applications, integrate existing and new IT applications, and automate and manage complex environments. A trusted adviser to the Fortune 500, Red Hat provides award-winning support, training, and consulting services that bring the benefits of open innovation to any industry. Red Hat is a connective hub in a global network of enterprises, partners, and communities, helping organizations grow, transform, and prepare for the digital future.

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