



Data Centre Migration Strategy

Know How, Know What, Know When



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1. Introduction

As a product, service and business support enabler, Data Centres provide the backbone for a majority of modern businesses. Data Centres, that is facilities owned and operated by the end user, vary greatly in size, quality and age. 3rd Party Data Centres, where either services or facilities are provided and managed on behalf of the end user, can also vary greatly in quality, service and capabilities. Making the business decision to migrate your Data Centre services, either between your own facilities or into the cloud, is a significant undertaking which can form a long process to get the idea accepted, planned, signed-off and executed

TORI Global has an established methodology for Data Centre Migrations that has been fine-tuned from live deployment experiences with our clients. In a single migration project, many key decisions on hosting, location and timing follow in sequence. Once initiated, early Assessment is followed by a longer phase of Discovery. Migrations should not commence until the critical mass of discovery information has been uncovered. Surprises occurring during Discovery often manifest themselves as scope creep, timeline drift and cost increase later in the migration.

Given the TORI experience of working with large global services firms, we earnestly believe that successful data centre migrations only arrive as a result of careful evaluation, detailed investment planning and alignment across corporate and divisional strategies. Programmes consolidating many centres into fewer strategic hubs, will often straddle years, not months of effort. Often, as a result of prior mergers & acquisitions global firms have complex data centre environments and unravelling the labyrinth of infrastructures, networks, dependencies, warranties, service levels and technical expertise should only proceed with a full understanding and corporate appetite for the risks, investment and realisable benefits.

Consequently, it is not sufficient to consider data centre strategies as an outcome of only the IT Strategy. Consolidation through migrations only arrives as a result of a combined strategy that embraces the strategies of IT, the various Business Regions and Divisions and Corporate Real Estate. This white paper addresses the mandatory precursor to any data centre migration project, Knowledge acquisition and Investment planning. The gathering in of this essential knowledge will produce a sound and justifiable investment case; a realistic migration schedule and programme assurance. With this knowledge repository in place companies can proceed with assurance that they are fully prepared to initiate and successfully achieve data centre migration programme objectives.

2. Know What, Know How, Know When

Switching off and decommissioning the last circuit, server and plant infrastructure in any data centre requires the meticulous construction of a migration plan. Rigorous programme control and governance of the plan is necessary to keep services maintained and risks managed. The migration activities are at the core of the programme. At TORI global, we have an established Data Centre migration methodology that we can deploy in partnership with our clients.

The TORI methodology cannot be located as an adjunct to a standard such as Prince for example. The TORI methodology was produced and fine-tuned as a result of many successful projects completed on behalf of our clients, with our delivery partners and in from the inputs and experience of our large pool of Associates. Our methodology succinctly



illustrates our combined knowledge of successful data centre migrations and depicts the intellectual property that we bring to our client assignments. Though the model reads sequentially, in practice it is anything but. Sequential delivery of the methodology would only serve to enhance time and cost and is unnecessary. Forward loading of critical path items and parallel running of work-streams will quicken time for delivery and reduce cost.

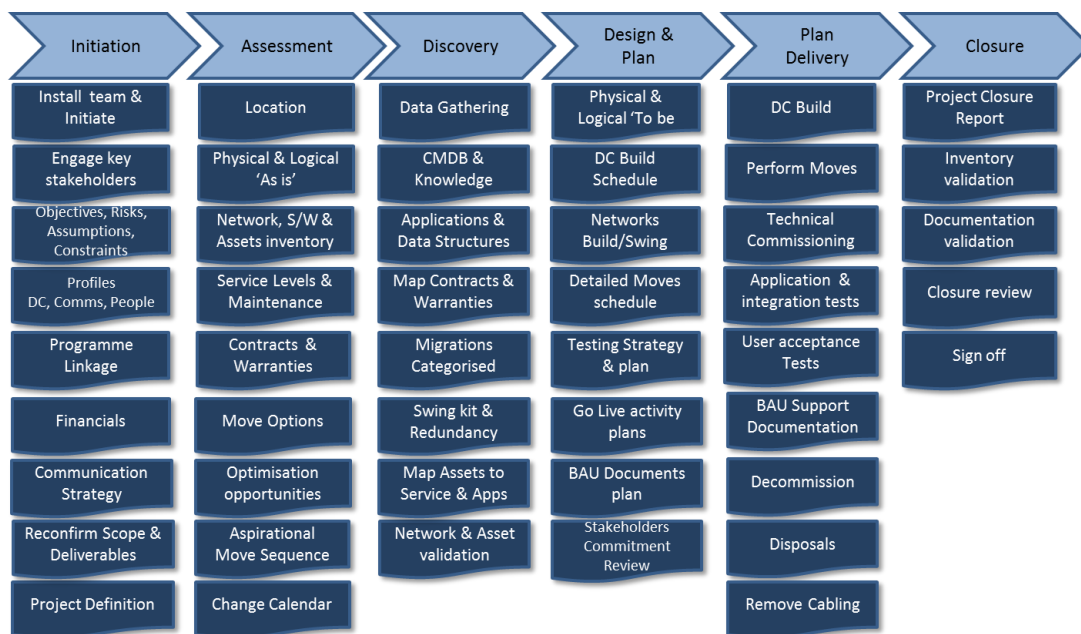


Figure 1 – TORI Data Centre migration methodology

Alongside the methodology we deploy a Governance structure that requires us to pass through quality gates for each phase. Supported by frequent and informed project reporting these ensure our clients know exactly what progress is being made and facilitate project steering from key stakeholders.

TORI clients can be reassured that we know what it takes to complete a successful data centre migration. But go back a step to before the migration starts. Think long and hard about the body of knowledge you need to justify the many £M that you will need to consolidate infrastructures and services delivered from many disparate locations into a minimum number of strategic global hubs. Consider the extent and quality of the base financial data you are going to need to ensure that your investment case stands up under investment board scrutiny and allows you to hurdle any payback threshold. If the thought unnerves you, engaging the services of TORI Global as your key delivery partner can allay those concerns. TORI has a generic, flexible and reusable approach for client engagements that is quickly adapted and deployed to the specific requirements of our clients.

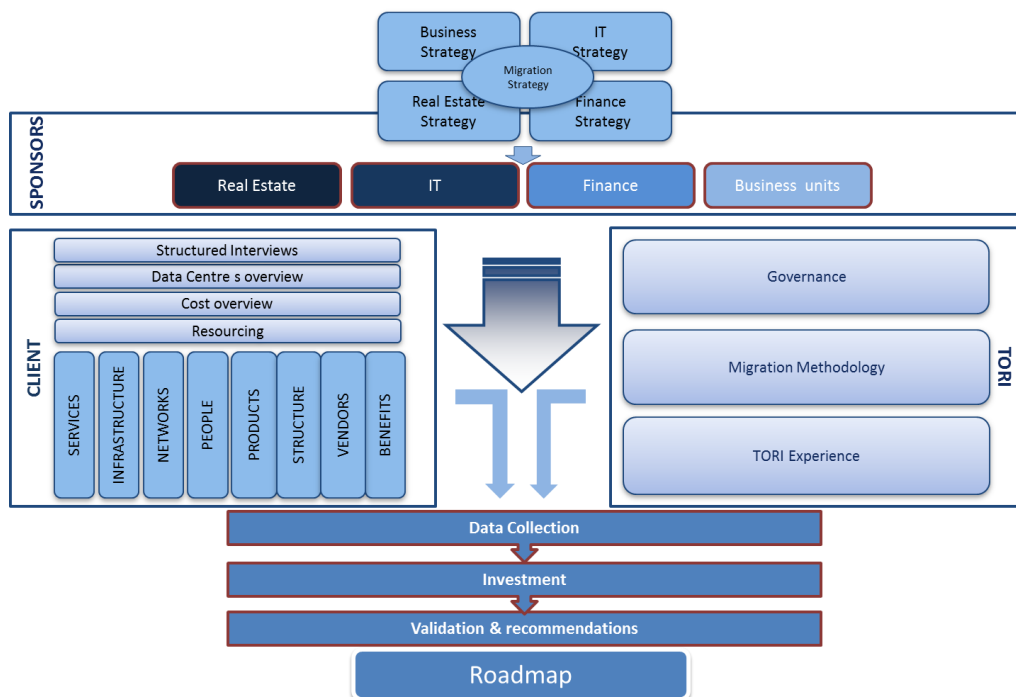


Figure 2 - TORI Data centre migration approach

Assuming that the hosting (Know Where) strategy is established then the key knowledge elements for an assured investment plan are 'Know How', 'Know What' and 'Know When'. Combined together these three essential components provide the knowledge repository that supports investment planning assurance through to successful management of a data centre migration.

2.1. Know How

Best run Data Centre migrations are a joint participation between the IT/ Real Estate / Business Divisions in the company. Each team brings along knowledge and expertise about the subject matter – the knowledge element that each team brings and develops as the migration plan progresses is absolutely vital to a successful data centre consolidation strategy. 'Know-How', will inform how you intend to relocate assets from your data centres. There are a number of move types available such as Lift & Shift, Virtualisation, Swing kit; Technical Refresh and even the one you don't need where assets local to the data centre are Decommissioned at closure. With the assistance of a comprehensive cost model it is possible to cost each move option globally to provide the financial investment information. Comprehensive means costing out items such as:-

- Human resources such as the core programme team; backfill for technical SME's; specialist vendor support; cabling teams; logistics teams
- Server costs
- Virtualisation costs
- Storage costs (Local & San)
- WAN connections



- Network ports
- Cabling per network ports
- Move logistics such as packing/unpacking; racking and stacking; transportation
- Ethical disposal of decommissioned assets

Building your Know-How ensures that the migration team has gathered specific information about the assets to be moved and stakeholder requirements. Thorough technical, business and logistical assessment of the information enables the generation and selection of optional migration approaches and their inherent costs. These are subsequently built into the investment plan. The second dimension to the knowledge spectrum is the 'Know what'.

2.2. Know What

This is the knowledge you need to gather about the migrating assets and the impact that migration will have upon the business and its customers. Know-what is the second mandatory input into your decision making and is related directly in a many to many relationship with 'Know-how'. If you don't precisely know what you have in your current Data Centre you will find it extremely difficult to deploy your 'know-how' successfully.



Figure 3 - 'Know How and Know What'

Consider for a moment the extent and quality of your 'know-what'. Even where the IT Team has deployed rigorous best practice change management into legacy infrastructure and services, the unravelling of dependencies across assets, communications, networks, software applications, interfaces, service levels, licensing and contracted services mandates strong programme, project and change



management expertise. With insufficient 'know what' your 'know how' is compromised. The two are mutually dependent upon each other. Between the two Phases of Assessment and Discovery there will be a variance in the number of assets accounted for. Spending the right amount of time gathering an accurate asset count for investment planning will reap dividends later on. Wide variances in asset counts found during the Discovery phase will have a domino effect on costs and saves later in the migration.

Know What provides knowledge about what your infrastructure and networks are costing you. A detailed audit of all data centre cost items will, in our experience frequently uncover waste and unnecessary cost items. An audit of your legacy costs will provoke challenges to the existing cost base. Examinations of the space and power taken up by each category of product in your data centre will cause you to question if there are more efficient means of providing the services. Even if there are not this is essential information you need to ensure your starting space and power utilisation at the new data centre is optimal and not over reserved. In our experience the audit will reveal significant legacy cost savings to supplement the savings an organisation will already anticipate from consolidation and migration to more modern, energy efficient locations.

These two dimensions of your acquired knowledge base will provide the very significant understanding you need to perform your investment analysis. But there is another knowledge dimension that will help identify the optimal dates to schedule your migrations and realise greater cost savings.

2.3. Know When

In a large consolidation programme, Data centre migrations should not run as sequential disconnected projects. In all likelihood the migrations will occur in parallel. Where this is set in a global context then, as products, services and teams are distributed globally, it's vitally important that the programme clearly allocates point responsibilities for the various business divisions amongst the programme team.

Migration dates are often set by a Real Estate decision not to continue an expiring lease. Where they are not then an optimum time for the migration needs to be agreed with the business units and Real Estate. Identifying the optimum time will produce realisable migration savings. Examples may include:-

- Product/service obsolescence occurring before the location closure
- Mandatory Platform upgrades occurring before the location closure
- Ongoing virtualisation/optimisation programmes occurring before location closure
- Opportunistic lease expirations of rented assets such as SAN or WAN /Client network connections
- Location break out clauses in the Real Estate portfolio
- Advantageous pricing/promotions of swing kit

Each example will provide a cost reduction opportunity and contributes input for establishing an optimal time to target a data centre closure and the migration of the assets held therein. An illustration of a sample forecasting report in shows the optimum month for closing a data centre would follow after December (Figure 4)

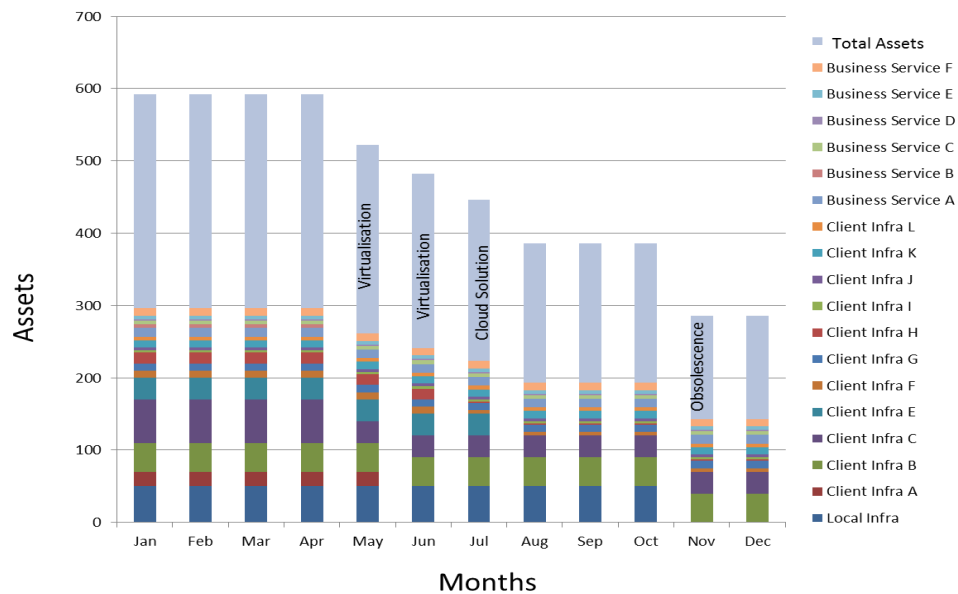


Figure 4 - Optimal closure forecast

3. Summary

This white paper is the consequence of TORI global accumulated experience of data centre migrations. It illustrates how data centre migrations should set about:-

- Garnering corporate support for a unified data centre migration strategy
- Acquiring the essential Knowledge that provides pre-assurance and operational information necessary to sustain the migration
- Assembling a knowledge repository that supports the investment decision; programme governance; risk management and the key activities and phases of a successful data centre migration.

If you would like to discuss the Data Centre Migration services provided by TORI Global then please contact us by calling **+44 (0)20 7025 5555** or via **info@toriglobal.com**



4. About TORI Global

TORI specialises primarily in providing solutions to industry leaders within global Financial Services organisations. The solutions we offer are innovative, realisable and sustainable with benefits that have real impact. We have a hard earned reputation for experience, quality and professionalism and have built long standing relationships with clients who set the most exacting standards. We are made up of practitioners who, prior to joining TORI, have enjoyed successful careers running business and support functions for many of the global institutions we now count as our clients. Since its inception in 2002, TORI has worked almost exclusively in the Financial Services sector and we have developed a flexible resource pool of highly qualified, usually personally recommended individuals who now work for us regularly and repeatedly.

Our Financial Services domain knowledge, coupled with the expertise of our select group of niche Alliance Partners and extensive Associate bench, allows us to deliver innovative solutions to our clients to meet their most critical requirements. We are driven towards areas of high complexity, high risk and high impact as that is where our clients need solutions delivered. TORI has performed data centre migrations for many major global Financial Services organisations.

We support our clients through the delivery of sustainable change programmes in the areas of our core practices. As major business change impacts People, Process and Technology, our key offerings to clients are underpinned by a number of core practices in or across those areas

5. About the author:

Dr. John Saunders is a trusted Associate of TORI Global. He has led a large data centre rationalization programme for a multi-national where key success factors were the knowledge base and the governance of financial investment decisions. He has also delivered systems and data centre services at well-known brands such as UBS, KPMG, Thomson Reuters, Royal Bank of Scotland, BUPA and Simplyhealth. John is a highly experienced interim programme director adept at business management as well as information & technology. His previous roles included board positions and he has held responsibilities across the full business life cycle from Marketing & Strategy through Business & Systems Development and into Data Centre and Business Operations.