**Overview**

A large financial services industry organization with a long history of virtualization engaged VMware® Accelerate™ Advisory Services to help drive virtualization maturity and larger scale globally. The organization already had a focused virtual services function operating a large number of x86 virtual machines in a global implementation.

**Project Scope**

A large financial services organization worked with VMware Accelerate Advisory Services to develop a plan that would help

- Drive increased technology investment for business transformation
- Decrease IT expenditures while accelerating growth
- Accelerate technology adoption

**Engagement**

Although it had made great progress in virtualizing a large number of servers, the financial services organization continued to struggle to effectively manage its environment and align its services with stakeholders. Its specific challenges centered on integrating and managing many dissimilar workloads. For example, its datacenters varied in size and type of environment (e.g., development, testing and production), each having unique configurations and standards. The organization was also challenged to address refresh cycles and life-cycle management, support platform-generation transformation and adopt state-of-the-art management tools in a rapidly growing environment. Its lack of ability to "force" central change fueled the complexity the organization was trying to reduce.

VMware Accelerate Advisory Services teamed with the VMware Professional Services Organization (PSO) to help the financial services organization through a process of defining its future state and identifying the issues that would impede the realization of that state.

Some of the key issues identified during the discovery phase were infrastructure complexity, business growth, provisioning speed, resource segmentation, application availability and configuration drift. For example, the organization had a wide variety of business applications increasing configuration complexity, and because of business growth, volume was expected to double within a year. The anticipated faster provisioning that growth would require would drive a greater need to better forecast and manage capacity. Resource segmentation was required to meet governance policies but constrained the ability to do effective capacity management. In addition, performance monitoring was inconsistent, and the organization did not track uptime or proactively monitor configuration changes over time.

To drive virtualization maturity and scale globally, the organization envisioned a future state that would reduce complexity while accelerating delivery speed to better manage growth, allow segmentation without constraining capacity planning, improve availability and reduce configuration drift. For example, the organization wanted the ability to qualify and validate line-of-business compute capacity requests, increase standard configurations from 80 to 90 percent coverage, and replace templates with "build on the fly" virtual machine environments. It also sought a transformation that would automate and integrate provisioning cycles that met or beat 24-hour service-level agreements (SLAs). Ultimately the organization sought to improve capacity planning and deliver proactive configuration management while enabling faster replenishment, improving virtual machine mobility, supporting multicluster provisioning, and gaining higher availability with improved performance monitoring and health management.
Recommendations

VMware strategists and consultants offered the following specific recommendations to enable the financial services organization to achieve its desired IT goals:

Technology

- Extend implementations of performance, capacity and configuration management
- Evaluate VMware vCloud® Director™ and VMware vCenter™ Orchestrator™ for improved provisioning speed and workflow
- Take steps to provision tier 1 and larger workloads so that all applications would be managed by the same tools
- Review and revise the resource reservation process to take advantage of the availability of consolidated data
- Evaluate platform as a service (PaaS) and disaster recovery (DR) as a service for future directions
- Continue with a long-term plan for improved virtual machine mobility

Operations Management

- Enhance virtualization environment support to handle continued growth
- Apply integrated tool set and operations process improvements
- Evaluate virtual system administration staffing—forecast virtual machine/staff ratios

Process

- Create a process improvement center of excellence—the key to attaining best-in-industry practices and status
- Conduct regular line-of-business surveys (“voice of the customer”) to understand lines-of-business satisfaction levels and to discover what other requirements stakeholders have for IT

Engagement Outcome Summary

The financial services organization is now redefining its procurement, capacity planning and provisioning processes. It is leveraging vCloud Director and vCenter Orchestrator to improve provisioning speed and workflow.

To enhance virtualization support and accommodate continued growth, the organization is engaging VMware PSO and VMware Accelerate Advisory Services to conduct an operational readiness assessment. The optimized and redefined operational support team will apply an integrated tool set to improve operational processes, enabling the firm to virtualize a greater number of tier 1 workloads and meet long-term goals.