SMOOTH MAINFRAME MIGRATION LEADS TO SMOOTH OPERATIONS

When an aging mainframe couldn't keep up with high transaction volumes and continued growth, a simple "lift and shift" upgrade strategy wouldn't do. Sungard Availability Services (Sungard AS) provided a realistic roadmap to the near and far future as well as the migration and hosting services to help Global Atlantic get there without disruption and ahead of schedule.

SOLUTIONS

- Mainframe hosting, data center and management services
- Mainframe migration services, moving from IBM Z10 Model 2098-K02 to IBM Z14 Model 3907-ZR1 c02
- 24/7/365 disaster recovery site and services
- Managed Recovery Program

RESULTS

- Mainframe transition with no downtime or business impact
- Migration completed before target date
- Increased data center security and resiliency
- Improved application responsiveness and uptime
- Batch processing speed increased by 70 percent
- Near-real-time Recovery Point Objective
- Recovery Time Objective five times faster

Global Atlantic
FINANCIAL GROUP

ABOUT THE COMPANY

Global Atlantic Financial Group, through its subsidiaries, offers a broad range of retirement, life insurance and reinsurance products. Founded by Goldman Sachs in 2004 and separated as an independent entity in 2013, the company combines its heritage with leading investment and risk management to help customers address their financial challenges with confidence.

> " It was a colossal migration effort, involving a lot of moving parts that required support from a wide range of resources. Timing and sequence would determine our success or failure. We completed these tremendously difficult activities on time or ahead of schedule, and we did it without causing any disruptions or downtime for the business."

Shawn Thomas
Assistant Vice President & Senior Solutions Architect, Global Atlantic

SUNGARD AVAILABILITY SERVICES®

THE CHALLENGE

In the interaction-driven industries of finance and insurance, processing delays and downtime are not acceptable. Especially for Global Atlantic, where more than 8,000 users access policy administration software every day to process applications and claims.

In addition to call center, operations, finance and reporting teams, agents in the field and external partners depend on the software, which drives the company's $75 billion in revenue.

To manage the increasing transaction volumes the application creates, Global Atlantic depends on the muscle of a mainframe. But when nightly batch processing started running into office hours and degrading application performance,

they knew it was time to replace the aging system and the off-site facility where it resided.

"We pride ourselves in maintaining a current technology architecture, so the fact that the environment was old was a big red flag for us," says Shawn Thomas, Assistant Vice President & Senior Solutions Architect, Global Atlantic. "The mainframe was struggling to keep pace with our growth, which could impact our ability to take on large blocks of new business or pursue large-scale partnerships. We were also limited in where and how we could effectively implement automation and other process improvements we needed to support the business."

THE SOLUTION

The power is in the plan

"We recognized the need to act quickly, but we wanted to make sure we were causing no disruption to business operations in the process," Thomas explains. "For that reason, we couldn't settle for a simple 'lift and shift' solution – upgrading in place and figuring out how to make changes in the new environment later. Instead, we looked carefully at our challenges and pursued a migration solution that was not just the most viable, but also aligned strongly with our future roadmap and objectives."

To better understand the issues that were occurring, Global Atlantic's project plan started with drilling down into the processes the IBM Z10 mainframe supports. From there, Thomas worked to quantify why the problems were an issue and how they created an impact, from time to market and productivity to finances and the company's brand image.

"Understanding the problem statements up front not only helped us create requirements; it helped us determine how to measure what our success would look like," he says.

Given the complexity and time involved in migrating applications, relocating equipment, bringing it live and supporting it over the long term, Thomas chose to outsource. After sending an RFP to a dozen vendors, he short-listed the group down to three. Sungard AS already provided a disaster recovery (DR) site and services program to other parts of Global Atlantic and emerged as the top choice.

"Sungard AS provided the most viable solution that solved for all of our problem areas and aligned best with our overall strategy," he says. "They successfully captured our problem statement and developed a solution that showcased our environment and what the roadmap looked like to transform it into the solution we needed."

He says the solution covers nearly all of the targeted virtual machines and physical servers, "but we do still have the earlier DR solution protecting a small number of legacy systems that were not compatible with the cloud-based DR. That's no fault of Sungard AS. Eventually we'll migrate those clusters of servers over to virtual machines and include them in the cloud recovery."

The company also looks to Sungard AS for Workplace Recovery Services. The longstanding contract covers dedicated office space, connectivity, and equipment for 25 employees should the company headquarters offices be unavailable due to an incident. "It's a small number of seats at a nearby Sungard AS recovery center," he says. "It will support key personnel that are critical to our business continuity."

Making the move

Thomas wore many hats throughout the project, taking on the role of technical lead, project manager and business analyst as he worked with Sungard AS to build out the statement of work, secure buy-in from Global Atlantic's Operations Committee and put the plan in motion. This included dividing the project into a number of workstreams and milestones, while reaffirming requirements to ensure they were locked down before work began.

Since application and dependency mapping is critical to migrating, managing and recovering a production environment, Sungard AS used its Automated Discovery and Dependency Mapping (ADDM) tool to understand and document the interdependencies of applications and their supporting infrastructures.

This created a change management database to keep track of assets and configurations, as well as upstream and downstream network connections, during the transition and after. It was also essential to establishing the critical applications that would need to be recovered as a priority.

Sungard AS teamed with its hybrid IT services partner Ensono on the project to build out a new production environment in an Ensono data center. Key milestones included consolidating and migrating the Ingenium insurance application onto Global Atlantic's mainframe, along with a major operating system upgrade and many application upgrades. All this work took place over just seven months.

"It was a colossal effort, involving a lot of moving parts that required support from a wide range of different resources," Thomas says. "Although we worked within a very complex environment, where timing and sequence would determine the success or failure of our migration, we completed these tremendously difficult activities on time or ahead of schedule, and we did it without causing any disruptions or downtime for the business."

Boosting business continuity

As part of the transition, Sungard AS fortified the DR environment already in place in a Sungard AS data center, located 265.3 miles away from the production environment in Downer's Grove, Illinois. Moving from traditional tape backup to a virtual tape library will speed recovery if a disaster or disruption happens.

As part of its 24/7/365 DR services, Global Atlantic now takes advantage of a Managed Recovery Program (MRP) from Sungard AS, which delivers the people, processes, tools and environments needed for full data recovery and four testing exercises a year to prove readiness and compliance.

"It's a very robust program that helps us continuously update and document changes in our production environment, including hardware, application and network environments. It also creates a roadmap for recovering them in the correct order, and with as much automation as possible," says Thomas. "Sungard AS provides us with a dedicated trio of people who are committed to us and to understanding the nuances of our infrastructure."

By revamping its recovery environment, Global Atlantic saw significant improvements. "Our recovery point objective is nearly current, and our recovery time objective is now five times faster," Thomas reports.

THE RESULTS

Resilience, backed with a trusted partner

The company is pleased with the ongoing Sungard AS relationship and the latest evolution with Recover2Cloud. "Sungard AS has been in the DR business for quite some time, and I've also worked with them while at a previous company. Their people clearly bring both expertise and experience to the table, and they have the flexibility to meet the needs of their customers. With those three things in place, it makes for an easy relationship."

"This transition to the Recover2Cloud solution happened while we were still in a contract for the previous Sungard AS DR solution," explains the senior manager. "Sungard AS understood

that our business had changed and knew what we were trying to do. We found a path forward together. Other vendors may not have shown that level of flexibility."

"I recognize that Sungard AS had to make an investment to deliver on our requirements," he adds. "So of course we worked together to develop a contract that covered the services and solutions our company needs while also covering the Sungard AS side from a business perspective. We have the kind of relationship that made that possible. We understand and respect each other's business objectives, and we're moving ahead together—one step at a time."

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