

# 7 key elements of a successful cloud strategy



CONSIDERATIONS CHECKLIST

## Executive Summary

Cloud technology can seem as intangible and mercurial as its namesake. But with a solid strategy and the right guidance, businesses can confidently move forward: making sound business decisions, charting a direct course through migration, and reaping the many benefits the cloud offers. But what are the key elements of a successful cloud strategy?

Forgetting for a moment the over-hyped assertions that “everyone is moving to the cloud” and “the cloud is the right decision for every business,” how will you determine if the cloud is the single best solution for your organization, or is just part of a more complex composite solution?

A solid strategy requires depth of understanding. Not just an understanding of technology — but an understanding of the complete business picture.



## Where are you going?

# 1

## Understand your end-state goal

In any journey, it is critical to have a clear destination in mind before you embark. When you are considering cloud technology, it is no different: your direction should be driven by your business objectives.

For example:

- Do you need automated deployment with the ability to scale on demand?
- Do you need a more agile development environment to accelerate new application testing?
- Do you need to shift from a capex to an opex business model?

Remember, your application architecture, automation platforms, template management, workflow and approval process, chargeback and costing procedures, monitoring, management, security, forensics, and so much more are impacted by any technology change.

Understanding where you are going is the first step to making a strategic decision and, for outsourced solutions, to determining a vendor whose processes, procedures, and abilities will best fit your needs.



## Can you do it?

# 2

## Understand your IT estate

Mature IT estates may include a variety of platforms such as RISC, SPARC, mid-range, and mainframe to name a few. Can these systems and the vertically-scaling applications which may live on these be moved to an n-scale x86 based platform? The answer, not surprisingly, is “it depends.”

A careful analysis of each application is required if performance and functionality are to be maintained. The application’s platform, scaling model, communications,

resource utilization, and more will need to be analyzed against the virtual environment it is slated to be moved to. In some cases, migration will be very straightforward. In other cases, the application can be refactored to allow for the new environment. And in some situations, your best option may be to keep the application “as is” and either continue to run it internally or look for a hosting vendor that can support it in its current state along with cloud offerings for a seamless, integrated solution.



## What are your options?

# 3

## Understand cloud types and their different advantages

It goes without saying that not all clouds are the same. You have to choose between private, public, community, and hybrid options. In defining your cloud strategy, it is critical to understand the differences in operation, management, scale, security, and governance for each of these routes. Your business goals should drive your cloud choice, not the other way around.

As a simple example, suppose your primary need is flexible scaling on the fly to match expenses with resources. While a private cloud can flex up and down, the reality is that you have to purchase the full capacity with your

capex budget. To realize cost savings, you would need to leverage a hosted solution — and for a truly massive scale out, you would likely require a public cloud.

Alternatively, you could consider “cloud bursting” where you provision enough capacity for steady-state operations but “burst” into a public cloud when higher needs arise (i.e. during periods of intensive development and testing). Or, a hybrid solution where you can match your IT estate requirements against different end-states could be the shortest path to a best-fit solution.



## What are the requirements?

# 4

## Understand your data governance and regulatory environment

HIPAA, FINRA, GL BA, PCI-DSS, SOX, and other frameworks present a variety of challenges to businesses in the form of compliance and data governance requirements. It is critical to account for how cloud adoption can be accomplished within these frameworks. In many cases, there are no specific barriers to leveraging cloud technologies and providers, but the requirements must be carefully analyzed from the design phase to ensure the provider or solutions chosen will support the business requirements for security, compliance and data governance purposes.

One of the key concerns for moving to the cloud is security. For example, you will need to understand the architecture of the cloud you are considering and how your security policies are supported within that infrastructure. This is done by a commitment to processes, following industry best practices such as ISO 20000-1 and ITIL. Security is addressed at the infrastructure layer via access and layering in security services.



## What about your users?

# 5

## Understand your user community

If you're like most organizations, your staff already has a full plate. Moving application(s) to a new platform has to be carefully managed so that it is not perceived as a risk, a loss of control, or change for change's sake.

- How do you make your existing technical staff stakeholders in the process?
- Are there developers and coders who need a test/dev environment?
- Have you fully communicated the benefits of cloud?

Staffs in production environments are always seeking management tools, security, availability, and resiliency. The benefits can and should be emphasized to help engage them in the migration process.



## What about your operations?

# 6

## Understand the impact to management and operations

Have you planned for how the addition of one or more vendors/external sites will impact your workflow, change control, monitoring, and other operational aspects?

While there are several worthwhile benefits to cloud including the ability to streamline operations, “disruptive technologies” such as a cloud-based model require new approaches to management and operations. For example, how will the addition of one or more vendors/external sites impact workflow, change control, monitoring and other aspects to your operation?



## How about availability?

# 7

## Understand the implications for overall availability

Availability and resiliency are key for every business. One strategy might include using the cloud for data vaulting, replication, and disaster recovery. In such cases, you have to take a hard look at your recovery cloud vendor for such details as:

- Which applications are business-critical, demanding the high availability that comes from an active-active environment, and therefore not appropriate for cloud-based recovery?
- Which secondary applications could benefit from a failover or recovery approach versus a high availability solution?
- Will your in-house resources fail over to the cloud?
- Will your cloud-based resources fail back internally, or to another cloud provider?
- Is the cloud vendor's environment compatible with the multiple application layers, hypervisors, operating systems and platforms in your production environment?
- How will changes to applications, platforms, or hypervisors in your production environment be reflected in your cloud vendor's environment?

We live in a hybrid world: part physical and part virtualized. For applications that run on hybrid workloads, recovery environments must reflect the particular mix of O/S, compute platform, hypervisor, and storage that exists in the production environment. Otherwise, your recovery efforts may very well fail.

Moreover, clouds are not immune to outages, and BC/DR plans need to account for resources being hosted in multiple sites, potentially on multiple platforms. These plans need to be documented, communicated and most importantly, tested at least once a year.



## Conclusion

Understanding the complete business picture is the key to developing a solid cloud strategy. That includes not only new and innovative technology elements, but also the current IT environment, resources as well as service level demands projected for the future.

Businesses that draw on this insight will be able to better understand and leverage these disparate elements into a single cohesive picture — and know with confidence the place that the cloud has in improving competitive advantage and future success.

For more information please visit our website at:  
[www.sungardas.com/cloud](http://www.sungardas.com/cloud)

### About the author

Joe Pampel, Consulting Director, joined Sungard Availability Services Consulting in 2011 as Director of Enterprise Architecture and Cloud Computing. He brings over 15 years' experience in designing, building, and managing high availability IT platforms for financial services clients. He leads the Cloud consulting practice which provides both tactical and strategic services around the complete Cloud computing lifecycle.

### Additional reading



[Building a Better Cloud](#)



[Cloud: Build vs. Buy - 4 Key Considerations](#)

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