

# ROI Solutions Implements New Data Lake House, Prepares for Large-scale Database Migration



## Executive Summary

ROI Solutions is a Massachusetts-based company that provides a leading customer relationship management (CRM) solution for the nonprofit sector. ROI Solutions' core product, Revolution CRM, empowers nonprofits to raise more funds and create higher awareness about their missions. Beyond the Revolution CRM product, ROI Solutions offers data management tools and services to nonprofits worldwide.

Recently, ROI Solutions worked with ClearScale to set up a new data lake house on the AWS cloud that would enable the company to deliver better data management solutions to clients. With the modern data architecture in place, ROI Solutions is now ready to move forward with a larger migration that will elevate performance and accelerate innovation significantly for the company.



## The Challenge

Initially, ROI Solutions' primary objective was to move its CRM application to the AWS cloud. The company knew it would benefit from having outside expertise involved. ROI Solutions kicked off an RFI process and ended up reviewing proposals from several potential implementation partners. ClearScale's proposal stood out for several reasons.

First, ClearScale had significant experience leading organizations through large-scale migrations to AWS. ROI Solutions wanted a partner that knew the ins and outs of migration planning. As an AWS Premier Tier Services partner with the Migration and Data & Analytics competencies, ClearScale's fit on this front was obvious.

Second, ClearScale had thorough knowledge of AWS' cloud tools. This meant ROI Solutions could avoid the trials and tribulations associated with testing different services for its unique business requirements. The client could instead lean on ClearScale for guidance on what choices to make.

Third, because of ClearScale's cloud experience, ROI Solutions realized the third-party engineers could help with much more than the migration. ROI Solutions decided to shift gears and focus first on defining and implementing the data architecture needed for a new solution offering before executing the application migration. This is where ClearScale's work began.

"It took us less than a year to go from concept to delivery. We would not have achieved our goals as quickly as we did without ClearScale. We're thrilled that we are able to launch a new product this year and begin benefitting from our investment so soon."

**Karen Engstrom**, SVP of Product Innovation, ROI Solutions

## The ClearScale Solution

ClearScale's first deliverable was to plan and define a target architecture for a new data and data analytics platform that ROI Solutions wanted to build. The collective team iterated through several proofs of concept and landed on an attractive solution.

Next, ClearScale stood up the new data architecture with robust cloud security protections. The architecture included a data lake house with analytics tools delivered through Amazon QuickSight. This would allow nonprofits to bring their data to ROI Solutions and derive valuable insights from donor information that would improve decision-making.

It only took nine months to go from concept to delivery. Along the way, ClearScale was instrumental in helping ROI Solutions select cloud services that fit the company's specific use cases, such as going with AWS Cloud Development Kit (CKD) over AWS CloudFormation. ClearScale also worked alongside ROI Solutions' internal team to make sure the client had the knowledge and resources to maintain its new cloud infrastructure successfully.

## The Benefits

ROI Solutions has benefited from this engagement in many important ways. The company now has more capabilities and potential to deliver high-quality data services to nonprofits. The product innovation team can bring new offerings to market much more quickly, and all customer data is secure in the company's cloud data lake house.

Looking ahead, ROI Solutions is gearing up to build yet another new product. The company is also prepping for the migration it originally envisioned now that all the right pieces are in place. ROI Solutions is excited to continue on taking its ever-evolving products to the next level.