Reorg Scales Strategic Acquisition by Integrating Target Company's IT Into Its Existing AWS Ecosystem

Reorg®

Industry: Financial Services
Tags: AWS, Migration

Challenge: Reorg needed help executing a SOC2-compliant migration from a third party managed cloud infrastructure vendor to AWS for FinDox, a business it recently acquired in the private credit market.

Solution: ClearScale used the AWS Application Migration Service and live read replicas to carefully migrate several application servers and database servers to AWS.

Benefits: Reorg was able to integrate FinDox's IT infrastructure into its existing AWS ecosystem in less than 6 months, with less than 2 hours of maintenance window, while adhering to SOC2 compliance and security requirements.

AWS Services: AWS Application Migration Service, AWS EC2, and AWS Direct Connect.

Executive Summary

[Reorg](#) provides a wide range of credit intelligence and solutions to over 30,000 finance and legal professionals in the form of in-depth reports, analytics, data, and more. Founded in 2013, Reorg works with investment banks, investment managers, law firms, corporate groups, and professional services organizations that need to make smart financial decisions amidst ever-increasing noise in the marketplace.

Reorg recently made a strategic acquisition of another organization, FinDox, a provider of data solutions for private credit markets. In absorbing FinDox, Reorg inherited the organization's entire IT infrastructure that was managed by a third party, prompting the need for a migration to AWS to reduce cost of maintenance and increase scalability. ClearScale was brought in to plan and execute the migration.

"We recognized the necessity of moving FinDox' s IT infrastructure to AWS, yet the optimal migration strategy, especially considering the crucial SOC2 compliance aspect, was unclear. Seeking external expertise, we partnered with ClearScale. Their guidance was instrumental in meticulously planning each phase of the transition, ensuring a seamless integration of both companies' IT systems within AWS. This collaboration not only facilitated our scaling objectives but also optimized our cloud expenditure."

Vishal Saxena, CTO, Reorg

The Challenge

Reorg charged ClearScale with designing a full migration plan and implementing it without disrupting services related to Reorg or FinDox's IT infrastructure. The migration would involve both applications and databases. One complicating factor of the overall migration was that FinDox is a SOC2 compliant product while SOC2 has not been a key requirement for Reorg's AWS environment given the nature of intelligence and data Reorg delivers to its subscribers. Therefore, the migration had to include proper SOC2 controls so that FinDox's new AWS infrastructure would meet the same SOC2 standards as the legacy infrastructure environment.

The company is heavily investing in data architecture and infrastructure so that it can scale its platform to meet double digit growth of its customer base. The company also wanted to move away from relying on a third-party infrastructure provider to manage its IT infrastructure, which was limiting the ability to scale and achieve the benefits that the cloud offers. The AWS migration was an opportunity to increase scalability, while also leveraging AWS services to reduce cloud costs.

As an AWS Premier Tier Services Partner with over 10 years of AWS migration experience, ClearScale was the right consultancy to support the work. ClearScale has earned 11 AWS competencies to date, including the Migration Competency. The ClearScale team had the expertise needed to accomplish Reorg's migration goals without causing any downtime or compliance issues across FinDox's IT infrastructure.

The ClearScale Solution

FinDox's third party managed infrastructure included both non-production and production environments. Each environment had multiple application servers and database servers.

On the application migration side, ClearScale took a lift-and-shift approach using the [AWS Application Migration Service](#). ClearScale engineers first created a new IAM user, policy, and launch template for spinning up new servers on AWS using Terraform for all the application instances. Next, ClearScale installed replication agents on FinDox's source machines. These replication agents were simple Python scripts designed to create byte-by-byte copies of FinDox's source machines that could then be replicated in target AWS servers.

After completing the synchronization process, ClearScale migrated FinDox's applications in three steps:

1. Launch test instances.
2. Launch cutover instances.
3. Update DNS records and application dependencies

This three-step process brought all the FinDox application servers to AWS with no disruption to business continuity.

On the database migration side, ClearScale minimized migration risk by first creating live read replicas in AWS based on FinDox' s source databases in the legacy infrastructure environment and then promoting the AWS instances to the masters. Taking this multi-cloud read-replica approach enabled ClearScale to ensure that database instances were in sync and working as expected before finalizing the migration.

After migrating FinDox' s resources to AWS within Reorg's existing environment, ClearScale performed a comprehensive security assessment. The goals of the assessment were to identify any potential security issues and obtain recommendations for remediation, which were especially important given the emphasis on SOC2 compliance. The ClearScale team also deployed Wiz.IO, a leading Cloud Security Platform to stay on the forefront of cloud security.
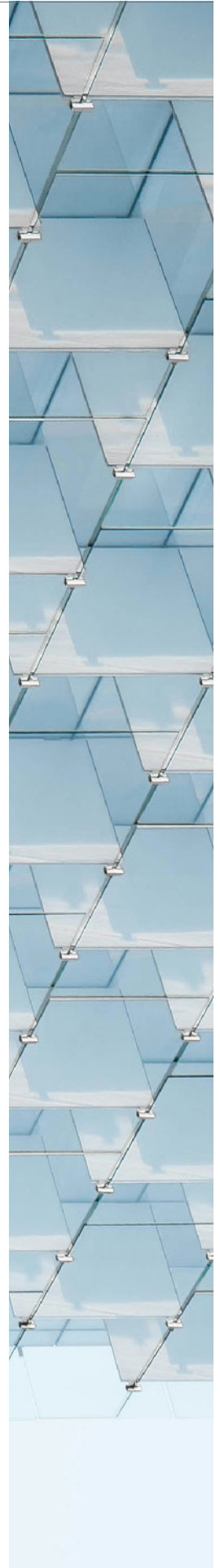
The Benefits

With ClearScale's support, Reorg was able to migrate FinDox-related IT infrastructure from a third party managed infrastructure to a self-managed AWS infrastructure successfully and create a unified environment for managing all cloud workloads in less than 6 months. Additionally, the combined AWS environment requires much less hands-on support from the DevOps team and Reorg is now able to manage the combined IT infrastructure with a unified set of controls and best practices. The use of Terraform to create IaC also allows the in-house DevOps team to maintain consistency across environments, which not only reduces the support burden but also allows the QA team to ensure quality of testing across environments.

The FinDox platform now has access to AWS' vast suite of fully managed solutions and innovative services that make it easier than ever to maintain its IT infrastructure. With this foundation in place, Reorg has what it needs to accelerate growth and build on what FinDox had already created in the private credit market.

About ClearScale

ClearScale is a cloud-native systems integration, strategic consulting, and application development company founded in 2011. The company has successfully delivered more than 1,000 innovative cloud projects for clients ranging from startups to large enterprises across all major industries. ClearScale's cloud experts design, implement, optimize, and manage customized cloud solutions that help customers achieve their business transformation initiatives.