

# Financial Wellness Group Gets Cloud Fit with AND

## Case Study

### Executive Summary

AND Digital worked with Financial Wellness Group to move its 20-year-old monolithic, legacy set of applications on AWS without impacting the rest of the group's core functions. It worked with AND Digital to shift data and applications, some requiring updating, safely and securely.

### About Financial Wellness Group

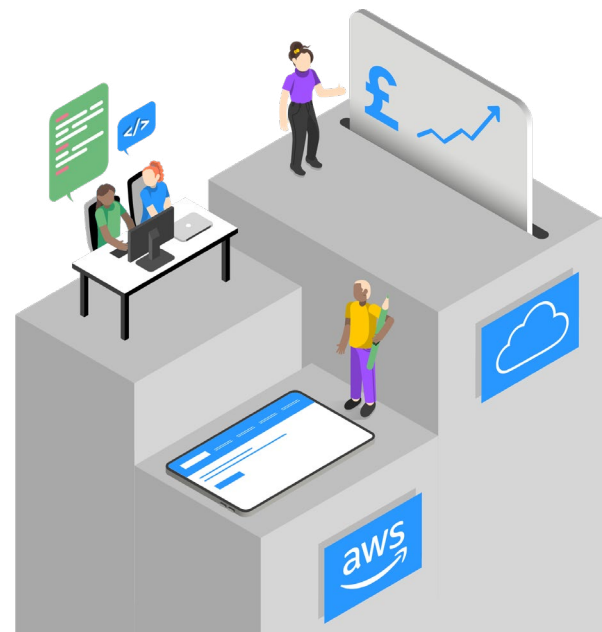
Financial Wellness Group (FWG) is a debt advisory company recently formed from the Think Money Group. The restructure provided a logical moment for FWG to review its technology. It decided to embrace the benefits of cloud infrastructure and chose AND Digital to help with the migration.

### Getting Ready to Move

The first step in the migration process was to review FWG's existing architecture and applications to scale out the project. AND Digital reviewed the company's tool stack and particularly looked for opportunities to automate.

The first stage of the project, given the deadline of december for the migration, was a straightforward lift-and-shift of the underlying infrastructure and networking to Amazon Web Services (AWS), which was completed by August.

This was required to support the company's ten key applications including a telephony system, a marketing website, correspondence application, web services, database, and a monolithic central application where the majority of the work resides. Some of these applications and services needed extra work so they could run on AWS.



**Company:** Financial Wellness Group  
**Industry:** Debt advisory  
**Country:** UK  
**Employees:** 250  
**Website:** [financialwellnessgroup.co.uk](http://financialwellnessgroup.co.uk)

Financial Wellness Group (FWG) is a debt advisory company recently formed from the Think Money Group. FWG decided it was a good time to embrace the benefits of cloud infrastructure and chose AND Digital to help with the migration.

### Challenge

FWG had to move a 20-year-old, monolithic, legacy set of applications on AWS without impacting on the rest of the group's core functions. It worked with AND Digital to shift data and applications, some requiring updating, safely and securely.

### Solution

AND Digital worked with the FWG team to create a tailored solution which used AWS Direct Connect to migrate the data to Amazon FSx. Applications were updated to AWS-supported software where necessary.

## Results

- Lower management overhead
- More scalable infrastructure
- DevOps culture
- The tools to move to micro services

## AWS Services Used

- AWS Direct Connect
- Amazon FSx

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*“AND wanted to be part of our team—towards the end it wasn't them and us, it was truly one team. ”*

Dan Flint, head of product, Financial Wellness Group

## Migration Challenges

Although FWG had a standard set of applications there were specific challenges for them and AND Digital to overcome. FWG's infrastructure had grown organically over 20 years. This meant there were a lot of systems nearing the end of their useful life—systems that were highly interconnected but not necessarily well documented. There was complexity around precisely defining business processes before any migration was even possible.

The network was still closely linked with the other three companies that had formed the original Think Money Group. AND Digital had to make sure nothing it did would impact their business-critical systems.

Some parts of the infrastructure were running on software that is no longer supported on AWS. The majority of applications revolved, in some way, around the central application and its file share system.

This was central to almost every function. Transactions were dropped into it and it acted as a bus for other applications to pick them up from—it was glue for all the company systems but was also used as a shared drive by employees.

Moving it turned into a major challenge because it contained an even larger amount of data than the migration team expected. AND Digital used AWS Direct Connect to migrate the data to Amazon FSx solution using custom scripts.

The company has a dedicated security and risk department so a deep dive into the security of FWG systems and processes was reassuring and in-line with standard AWS policies.

But the COVID-19 pandemic made the project more difficult. None of the AND Digital team have ever set foot in FWG offices or met any of its staff face-to-face. All communication has been virtual, and the team have not seen the network which they are replicating on AWS.

Despite this, AND Digital credited the FWG team for working alongside them and understanding the potential benefits of the move.

## Lessons Learnt and the Benefits of Hindsight

Dan Flint, head of product at FWG, said that the team was used to working remotely and with people in different countries, so the pandemic was not a major change to working practises.

But there was the challenge of standing up to any team.

Flint says: “It's about learning how to work with each other—managing expectations on both sides was vital to the success of the collaboration.

With the benefit of hindsight Flint says there would have been

different approaches.

“We started with the applications rather than the data, we’d have been better to start with the data. This may not be true of all organisations—if you had a lighter, newer stack—but with a legacy stack and a lot of complexity within applications and databases, I’d start with the data and then work on the apps.”

For the future, the move should allow the IT department to be dynamic and responsive to whatever the business wants. FWG already has a far greater ability to scale systems up and down. All the platforms were standing up and running before Christmas, and when the break came, everything could be stood down again, bringing costs to zero, which would have been impossible using the old data center.

Flint says: “Lots of AWS works pretty much out of the box so we should be able to spend far less time managing the estate.” The move will also help to change the team with embedding a DevOps culture, by giving teams the self-reliance and autonomy to get on with their jobs without relying on other functions.

Flint said that the other big lesson learnt was that different parts of the business had taken slightly different routes, and that one size does not fit all.

He credited AND Digital with genuinely engaging with those individual problems and not just offering an off-the-shelf solution and trying to make it fit the circumstances. He says: “It was a much more tailored approach to exactly what we were trying to solve and the estate we have.

“But what I really prize is the cultural fit because it makes such a difference to getting the outcome you want. “AND wanted to be part of our team, not separate. For me that was the biggest success we had—towards the end it wasn’t them and us, it was truly one team.”

AND Digital also demonstrated a deep level of expertise around AWS services.

## Next steps

FWG is already planning the next steps—to re-engineer and re-factor its application set in the later part of the year, once the initial migration is completed.

It will benefit from a development platform that looks like the production environment and from an automated application and platform pipeline with an agreed tool set. Now that it can automatically stand up some infrastructure, it has created the opportunity for future cost savings.

## Benefits



Lower costs



Scale up automatically



Less management overhead

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