❝ Overall, migrating to Atlassian cloud has totally been worth it.

ERICA LARSON
Process Engineer

CLEARWATER
ANALYTICS

$75K
Annual AWS hosting savings

Clearwater Analytics works smart and speedy on Atlassian cloud

Learn how Clearwater Analytics migrated to Atlassian Cloud to work faster, make more informed decisions, and enhance security.

ATLASSIAN | **HyperVelocity**

THE CHALLENGE

As avid users of Atlassian Data Center, Clearwater Analytics wanted to spend less time on maintenance and take advantage of cloud features and efficiencies.

THE SOLUTION

The company migrated to Atlassian cloud tools (Jira Software, Confluence, Jira Service Management, Bitbucket, and Statuspage, and Opsgenie) with the help of their Solution Partner, HyperVelocity.

THE IMPACT

Engineers can focus their time on more meaningful work, and all teams are more connected, efficient, and equipped to track their progress and goals. Their data is also more secure.

Is a migration worth it? Clearwater says, "Totally."

There are plenty of stories about migrations that go seamlessly, but what about those that don't? Process Engineer Erica Larson and her team at Clearwater Analytics experienced stresses and successes during their migration to Atlassian cloud. Although there were bumps in the road, Erica says unequivocally, "Overall, migrating to Atlassian cloud has totally been worth it."

A high-stakes business on a mission to lower maintenance and forge toward the future

Clearwater Analytics helps simplify investment reporting for over 1,000 companies, asset managers, and insurers around the world, who collectively manage over $6.4 trillion (with a "t!") assets. One wrong piece of data, minute of downtime, or broken process on Clearwater's side can ripple into problems for customers and their end clients. Needless to say, the stakes are sky high.

As a process engineer, Erica feels this pressure every day. But rather than letting the stress get her down, she gets excited about solving problems and unblocking her teammates so they can do their best work. "I really want to build good processes for them so they are able to just write code. And that's where a lot of our time is spent: primarily with Atlassian tools and helping people build good processes in Atlassian tools," Erica explains.

With an eye for process improvements, Erica's team noticed that the time required for IT to maintain Clearwater's Atlassian Data Center tools was taking away from their ability to focus on more valuable work. Plus, she saw the industry moving toward the cloud and was intrigued by the new features and efficiencies the company could gain if they migrated.

"I did the total cost of ownership analysis and said, 'We're going to pay more money in licenses...But we're going to save all of this money and use our teammates' time more wisely.' It was just worth it," Erica says. "Security and compliance is also really critical in the financial industry. Atlassian cloud met all of our needs, which is wonderful...Plus, Atlassian is going cloud first, and we could take advantage of all the new features, like Atlassian Intelligence. We needed to move in this direction. It was an easy sell to my executive team."

Preparation, education, and collaboration set up the team for success

With the migration project approved, Erica's team rolled up their sleeves and started preparing. Reading online materials, taking Atlassian University classes, and watching partner webinars helped them understand the road ahead.

During their research, the team realized they needed a Solution Partner to provide additional expertise and guide them through the process. Clearwater's Atlassian Technical Account Manager, Gary Carlin, provided several options, and Platinum Solution Partner HyperVelocity (an Isos Technology company) rose to the top of the list. With HyperVelocity's migration runbook and hands-on guidance, Clearwater began moving forward.

While many of the migration steps went according to plan, several challenges took more time than expected, such as third-party integrations with external and homegrown tools. Clearwater pulled in HyperVelocity and users from various departments for troubleshooting and testing.

"Having a cross-functional team [of collaborators and testers] was honestly probably the best thing we did," Erica says. "We have over 1,700 employees now. Every person and every department does things a little bit differently, so we needed to make sure we were meeting those use cases as much as possible. If things were breaking, we needed to make sure we had a solution so that when we went live, we were going to be as successful as possible."

> 66 The automation functionality within Atlassian Cloud has been leaps and bounds above the Data Center experience. Moving into Jira Service Management Cloud and building out a lot of automation to create or even eliminate tickets has been a huge time savings too.
>
> **ERICA LARSON**
> Process Engineer

If at first you don't succeed, try, try again (with more even prep and partnership)

As the team kicked off the migration and progressed through each step, they started running into snags. "We unfortunately didn't do enough cleanup. All of our service accounts that act as bots for us to automate processes ended up pushing us over our user license limit, and that blocked us on our migration," Erica recalls. After trying to reset the next day and encountering more hiccups, the team decided to pause and try again another time.

Disappointed but far from defeated, they spent the next month doing more cleanup and testing to iron out issues. Erica says this additional work was "actually really beneficial" and gave them reassurance going into the next attempt. Their perseverance paid off, and the second migration was a success!

Atlassian and HyperVelocity were by Clearwater's side every step of the way before, during, and after migration. "Atlassian was really supportive in providing multiple resources and sorting out questions...Wellington [Costa, Software Engineer] was awesome with technical support...and Atlassian solved so many things post-migration, like fixing the links between Jira and Confluence," Erica says. "And HyperVelocity just killed it. They made sure our team around the world had support...It's super helpful having somebody by your side who's been through it before and can provide you with guidance."

Efficiency, visibility, and security: the "huge benefits" at the end of the road

Now that Clearwater has fully migrated to Atlassian cloud tools (including Jira Software, Confluence, Jira Service Management, Bitbucket, Statuspage, and Opsgenie), the team is seeing the results of their hard work. With process improvements to security enhancements, IT and software engineers can more, worry less, and make the most of their time.

On top of saving $75,000 per year on AWS hosting costs, Clearwater is reducing other costs by eliminating tools that are no longer needed and using employees' valuable time wisely. "One of the biggest benefits we've seen with Atlassian

> **❝** Security and compliance is really critical in the financial industry... Atlassian cloud met all of the needs that we have.

ERICA LARSON
Process Engineer

cloud is making sure we're working on the right things and spending the right amount of effort," Erica notes. For example, Clearwater has automated many of their manual, tedious engineering and ITSM processes so team members can spend time on more strategic work and provide even better service. "The automation functionality within Atlassian Cloud has been leaps and bounds above the Data Center experience. There are so many more trigger and action options available. Moving into Jira Service Management Cloud, building out automation to create or even eliminate tickets, and using the conditional workflows and fields for forms has led to huge time savings," Erica explains.

Migrating to the cloud has also created a single source of truth that helps Clearwater's R & D team (typically known as Software Engineering) work faster and better track their goals and progress through each stage of the development lifecycle. "The connectedness between all the tools has been a huge benefit," Erica says. "The way that Confluence and Jira link together, I can embed an entire Scrum board now on a Confluence page, and it stays up to date. And there's Jira data right there in Bitbucket after our recent Bitbucket Cloud migration. I don't need to go to more than one place to see that information. That's been way more efficient in the cloud, and my team members don't need to be in five different tools within a five-minute period to understand what's going on."

Engineers are not only able to work more efficiently, but also more effectively with native cloud features and tools, including Advanced Roadmaps and advanced reporting. They've started doing quarterly planning with Advanced Roadmaps to set and track goals, objectives, and key results, which they document in Confluence Cloud.

"Through the planning process, our 500+ person R & D Department knows what everybody is working on and what they need to actually build features out. Having that visibility in one spot means we can try to remove dependencies and blockers quicker," Erica says. "Atlassian cloud has helped us with better metrics

and reporting around sprint data points too. We use Advanced Roadmaps to calculate team capacity and estimate effort to determine if we're over or under planning work for our teams; Insights to see items in the active sprint and backlog; and Sprint Reports during our sprint reviews, retros, and Opsgenie incident troubleshooting for further context. It's been super helpful to have those metrics at our fingertips."

For many team members, Atlassian cloud tools have enhanced the way they work. For others, the lack of big changes has been equally satisfying. "Some team members have said they're just happy their main processes weren't impacted significantly by the migration. It was easy for them to pick up and start running in the cloud with minimal changes to their workflows," Erica explains.

Clear waters ahead

With all the positive feedback from the migration, Erica's team is now exploring all the ways they can get the most out of their Atlassian cloud investment, such as expanding automation and taking advantage of the native Assets tool to manage security and compliance processes. "It all comes back to using our team members' time wisely…It's been so exciting to be able to say, 'Hey, we've got these tools and feature sets here already.' It's a huge time and cost savings by not having to use separate tools," Erica says. "The feature sets and the support that Atlassian has provided us through the migration, how it's freed up our team members' time, and being able to focus on our tools have been really amazing!"

Part of Clearwater's mission is to "be the world's most trusted and comprehensive technology platform that simplifies the entire investment lifecycle." With patience, partnership, and perseverance through the tough moments, their team finally has the same type of powerful platform for their own team.

Explore how DevOps is better on the cloud.
Learn more.

ATLASSIAN