THE 5 STAGES OF SUCCESSFUL CLOUD MIGRATION
SUMMARY

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MOVING TO THE CLOUD WITH A PLAN AND A PURPOSE

Cloud services like Microsoft Azure and Amazon Web Services (AWS) are robust tools for business success. They have evolved far beyond the obstacles and limitations of the past. In 2017 alone, the cloud grew by almost 40% - a phenomenal growth rate for any technology. By 2020, 60% of IT infrastructure and 70% of software and IT services spending will be in the cloud.

When deployed effectively, the public cloud is a powerful and disruptive model. It brings positive operational transformation and greater competitiveness. But poor implementation is equally disruptive.

54% of IT leaders report that their teams struggle to form a cloud strategy – the first step of a cloud transition - which is why we created this handy guide.
WHY CLOUD? WHY NOW?

The pace of innovation is rapid and relentless. To keep up, business leaders place ever-higher demands on IT to support their growth and business initiatives. The public cloud has emerged to offer the speed and flexibility required to meet those demands.

Make no mistake, moving to the cloud is a fundamental shift in business. The impact of cloud adoption affects your entire organization — not just IT. Cloud is a transformative piece of technology. When a business opportunity presents itself, it can be used to quickly put a solution in place. If a business area is no longer relevant (or there is a downturn), cloud can help companies reduce their technology footprint with speed and grace.

Your existing IT processes and controls should be a fundamental part of this shift. Even though the cloud presents a new set of tools and technologies, you should modify your processes and controls to conform to cloud operations. This will help you ensure that you provide the proper solutions within budget and with appropriate administrative authority.

Before taking the plunge, consider the underlying motivations for the move. What triggering event, business change or challenge is driving you to the cloud?

Is it time for a major hardware or software refresh? Are you facing strict new industry regulations to which you must respond? Top-down pressure to do more with less is always there. Is there a new business approach or service being launched that needs more agile technology support?

**In short:** What is the business transformation that’s prompting your technology transformation? With that knowledge in hand, you can begin on the path to successful cloud adoption and achieving greater value from it.
INTRODUCTION: MEET THE FIVE STAGES OF CLOUD ADOPTION

Softchoice has worked on countless cloud initiatives at all stages of adoption with our clients. Through that, we’ve identified five stages that allow you to methodically approach your migration.

These five stages of cloud adoption act as a framework that will help you to build your cloud strategy. It will also give you peace of mind around cost, operations, and security.
**Stages, not steps**

We’ve called them stages for a reason. While you progress through the stages, the journey isn’t exclusively linear. You may find yourself weaving in and out of stages as you move workloads to the cloud and will likely repeat some or all of these stages as you move additional workloads.

**There’s more!** Throughout every chapter we’ve included best practices, tools, and templates to keep you on the right track.

**Tips and Best Practices**

**Available tool**

**Articles + Guides for download**
Gap analysis is the assessment of what you need to reach your cloud goals. Going through this process will give you clarity. Clarity on your current utilization and configuration and clarity on what you can anticipate costs to be in the cloud. It’s determining the delta to bridge between where you are, and where you want to be.

It may sound simple, but in helping deploy hundreds of cloud initiatives we’ve found that a thorough gap analysis is often the missing component. In fact, when cloud initiatives fail, it is often because the gap analysis was insufficient.

When gap analyses fall short, it’s usually from poor self-assessment or a poor understanding of the fundamental differences cloud presents around financial and operational models.

Coming out of a gap analysis you should understand the following:

- Your average usage/consumption
- Your current configuration
- Current costs associated with keeping your data center running
- Expected costs in the cloud – on a month to month basis
- A general understanding of the other business units you’ll affect
WHERE ARE YOU TODAY?

Once the need to move to the cloud has been determined, the most successful cloud companies develop a detailed and objective understanding of their current state and costs. Sadly, most businesses lack the tools to track their resource consumption across the breadth of levels, departments, and stakeholders that exist.

There are automated tools out there to help you with this part of the process! Doing it manually means logging into each server to see how much CPU and memory is being consumed on average. Multiply that by, say, 300 machines and you can see how this can bring your migration to a halt just to understand your utilization.

We recommend creating a profile of your current state that includes:

A full assessment of data center usage and configuration. Look at the cost of everything that touches your storage, server and network resources. How much are you paying for what you are using? And how much are they currently configured to accommodate?

Fact: Your current resources are likely configured to accommodate much higher performance than what you are actually using.
A common mistake made by companies moving into the cloud is configuring their server the same as it was on premise. Since it wasn’t right-sized, you’ll end up spending more than you should.

If we didn’t make it clear enough how important it is to understand your current utilization vs. configuration keep in mind there are egress charges: an incremental charge for data that leaves the cloud.

The cost of your facilities and utilities, including cooling and power and real estate. The more detail the better, of course. You may need to reach out to other departments for this information. While this may seem cumbersome, keep in mind that understanding this is important. These facility costs disappear once you’re in the cloud. Having visibility builds a more accurate picture of current costs vs. expected costs in the cloud.

People costs. How is your IT staff currently allocated? What maintenance and infrastructure roles may not be needed in the cloud? How much effort does physical infrastructure take, and how will this change as systems move to the cloud? Start thinking now about how you will reallocate and retrain these resources. Imagine what is achieved when these resources are spent on initiatives that drive innovation around business goals rather than keeping the lights on.

Already in the cloud? It’s not too late

Even if you are in the middle of migrating to the cloud, you will be well served by conducting an in-depth gap analysis if you have not already taken this step. This will ensure you’re on the right path and help you to consider many aspects of cost and change you may be missing.
WHERE ARE YOU GOING?

A migration to the cloud is not just a lift-and-shift exercise, in other words, simply transposing what you do in your data center to the cloud. It represents a fundamental change in how resources are consumed and how the business pays for them, moving from CAPEX to OPEX. Treated as anything less is basically begging for cost overages and ugly surprises.

When looking at what your move to the cloud will cost, you must adopt a pay-for-performance mindset. Many in IT gravitate towards bigger, better and faster, to support peak performance requirements or growth of systems over time. This makes some sense on-premise, where it may provide a certain degree of future proofing. But not in the cloud, you only pay for what you use. As suggested above, think about use, not configuration.

Going through a gap analysis may seem like a massive undertaking. Truth be told, it can be a straightforward process however, one that requires participation from multiple stakeholders. A thorough gap analysis also helps reinforce the justification for your cloud migration, something that becomes all the more important when you move to the next stage: Get Moving.

At Softchoice, we’ve developed a tool to help with the time-consuming process of assessing your current usage called the Public Cloud Assessment. Keep reading to see what kind of outputs you get with our assessment.

**It’s not about cost!**

*It is a mistake to see your move to the cloud as a tool for cost savings. On the surface, the cloud costs as much or more than your on-premise solutions. The value is from intangibles such as increased focus on innovation, improved accountability, greater productivity and faster time to market. More on this later!*
GET IT RIGHT, RIGHT OUT THE GATE

Not sure what your gap analysis should look like? At Softchoice we have a service called the Public Cloud analysis. It gives you information like a detailed account of each server and it’s consumption, as well as projected costs in a forklift vs. optimized scenario.

MAPPING CUSTOMIZATION

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<thead>
<tr>
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Still not sure what surprise costs await you in the cloud?
Read our article 3 Ways to Predict Cloud Migration Costs to find out.
When we say, “Get Moving” to the cloud, it isn’t exactly like saying “Just do it!” Although getting started with your first workload is important at this stage, this is really the time to do the front-end work that lays the foundation for future successes. Your first initiative is a great opportunity to get stakeholders united around the strategic vision the business has for cloud and ensure there is buy-in from all affected parties.

A quick, meaningful win is essential to building momentum. Choose the first workload to move to the cloud carefully, but get going.

**Finding balance**

One of the biggest governance challenges you’ll face is achieving a balance between ease of provisioning resources, and maintaining compliance and controls. When developing your compliance strategy, don’t lose sight of your purpose for moving to the cloud in the first place.
YOUR FIRST WORKLOAD

There are two reasons to get moving before a more formal plan is developed. You quickly build real-world experience. And, it helps further develop the use case for the cloud.

When deploying your first workload to the cloud, choose something manageable yet important. You want to demonstrate strategic value across the organization while keeping the level of complexity and risk of failure relatively small.

Ask yourself these questions when evaluating your first workload. If you answer ‘yes’ to any of the below, try and find another application:

1. Is it a legacy application?

2. Is it a custom application?

3. Does the data require the highest level of security?

4. Does the data require compliance with other applications like Sarbanes-Oxley, PCI, and HIPAA regulations?

5. Does the underlying hardware and OS need to be highly available?

Still not sure what application to start with? Check out our article How to Select Your First Cloud Workload.
Below you’ll find an example of the items we recommend to be in your application profile

### OVERVIEW

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### CLOUD READINESS

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### ROADBLOCKS

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### APPLICATION PROFILE DEPENDENCIES

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THE NEED FOR GOOD GOVERNANCE

Internal stakeholders need to be considered in any cloud initiative. Buy-in from finance, security and, if one exists, the strategic projects department is crucial. Often these teams reap the most rewards from the cloud but can be its biggest nay-sayers.

This is a step that is often over-looked for businesses when they are transitioning to the cloud. This is all about controlling spend and workload visibility. Ask yourself and cross-functional partner’s questions like:

- Who owns this application/workload?
- How do we bill for it?
- How does someone request setting up a new workload?
- How are applications decommissioned?

These groups may have a hard time seeing how the cloud will play out in terms of loss of control, budget, financial model changes and security posture. Ease those fears by putting in place solid financial and operational governance best practices.

Learn more about how to overcome the challenges of getting moving with our article "The Battle for Cloud Adoption begins with your stakeholders."
Financial governance is very important to keep in mind. Moving to the cloud changes your technology consumption model from CAPEX to OPEX. Your financial governance should include visibility into usage and performance. It should also enable you to charge or billback workload-related costs to a department, project or individual. In our experience this level of visibility and accountability is a powerful way to prevent over-spending.

It is important that procedures and controls be in place to ensure cloud resources are not provisioned without being attached to specific projects, initiatives and business goals. Start by nailing down roles and responsibilities: who is authorized to turn on new infrastructure, and what does your security posture look like in the cloud? How do you manage this in your data center today?

**Operational governance.** One of the cloud’s biggest advantages is the ease of provisioning resources. Automation or orchestration further improve this but demands another layer of diligence. To start, IT leaders need to embrace the practice of ‘least privilege’ whereby administration rights are based on the absolute minimum requirements the individual needs to do their job and nothing more. Combined with documented policies on how cloud resources are requested and retired can help avoid costly ‘compute sprawl’ and ensure those who stand up and manage workloads are ultimately accountable for the costs incurred by their work. To succeed in this area, you must define roles and responsibilities. Define who will be responsible for infrastructure procurement, assign authority to turn on cloud services, and determine who will assess your security posture in the cloud.

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**What’s a showback?**

For finance the ability to have accountable chargebacks for IT resources is a major advantage of cloud. Showbacks are similarly enabled by cloud. In a showback model, IT resource use are tracked and presented by application, end user or line of business but not billed. This creates cost awareness, can help foster a culture of accountability and assists with justifying business decisions around IT infrastructure.

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**Zombie Storage**

Setting up an application in the cloud can be relatively simple to test and develop. However, once you’re ready to decommission you have to do more than just turn it off. If there is storage attached to it, once the application is turned off, that storage continues to sit there, and rack up costs.
Tip: Keep in mind dependencies!

We touch on this more in Stage 3: Planning but make sure you understand which applications are dependent on each other and understand the complexity. Here’s a common scenario: a line of business application is dependent on a reporting service. If you move the one line of business into the cloud but it’s dependent on the other, performance could degrade and your phone could start ringing with people complaining about the cloud.

To learn more about the most common mistakes and how to avoid them, check out this guide: Controlling and Optimizing your Costs in the Cloud.
ROADMAP TO SUCCESS

With all the competitive advantages available, your move to the cloud needs to be an unequivocal success. Your first successful project lays the foundation for another and another.

Developing a plan for what to migrate and when will ensure you maintain that momentum-building success. Unfortunately, most businesses plan their cloud projects with an incorrect assumption that often comes back to haunt them. But you don’t have to be one of them!

CLOUD ADOPTION IS NOT A DATA CENTER MOVE

Businesses too often treat their cloud projects like the moving of servers or infrastructure between locations. It bears repeating: moving to the cloud is not a simple lift and shift of your applications.

Applications that worked on-premise won’t automatically work the same, or at all, in the cloud. Others may require an upgrade to be cloud ready. Your application of choice may have interdependencies; moving it to the cloud may rely on your ability to move another. Also, there are many opportunities to optimize how an application operates in the cloud, further extending the benefit of the cloud itself.

Your adoption plan must take into account the technical requirements of all software, the effects operating in the cloud will have on their performance, and how to meet your business SLAs and regulatory requirements within the cloud.
FOCUS ON APPLICATIONS

The typical server-based approach to migrating to the cloud is not a strategic one. Instead, build your cloud plan based on your applications and their suitability for the cloud. This will also make certain you have a deep understanding of each application – its impact, dependencies, business value and any potential roadblocks – all before it even touches the cloud. Start by profiling your applications.

Start by profiling your applications. Determine which are dependent on each other, which pose the greatest risk, and which are the strongest candidates for the cloud. Pay close attention to risks, complexity, dependencies, operating costs and suitability. Remember not everything belongs on the cloud.

Spring cleaning! Moving to the cloud allows you to get your “house” in order. You can declutter the applications you have. Do you have redundancies? Planning for the cloud is a good opportunity to upgrade, rationalize and standardize your existing applications.

Determine the business impact of moving to the cloud.
Consider not only the value of moving the application but also what SLAs need to be in place to maintain quality and support the user experience. This is best done by meeting with business stakeholders and presenting migration scenarios.

Create a phased roadmap. With that hard work done, selecting the most appropriate application to move, and the next, and the next, and so on, becomes a much simpler task. Start with the low-hanging fruit that can be moved with little to no disruption and increase complexity in sub-phases. Often, without the benefit of such a roadmap, cloud initiatives grind to a halt after the first app and you lose the true value of cloud adoption.
DON’T FORGET A SECURITY PLAN!

Thorough planning around security is essential to success, even for minor cloud projects. While cloud service providers such as Microsoft and AWS provide some security resources, it’s best to treat these as the foundation on which to build your security capabilities. Keep in mind: the cloud does not replace your own responsibilities.

Get familiar with the shared responsibility between you and your service provider. What aspects of security they take off your plate and which they leave varies based on provider and service type (IaaS, PaaS). We can’t stress how important it is to fully understand your accountabilities.

Cloud doesn’t make up for bad security and moving unsecured apps to the cloud will not magically fix them. But reviewing applications and taking advantage of cloud security can be a boon to your security efforts.

Taking advantage of cloud-based security and business continuity requires you to embrace best practices in identity and access management, endpoint security, disaster recovery and backup and security policies. The cloud doesn’t make up for bad practices or poor policies.

Find out more Azure Security Best Practices in our cloud security article.

Learn more about Cloud Application Migration: Developing a Focused Roadmap.

Remember: Not every workload can or even should be moved to the cloud. Your roadmap will also help you determine what stays behind.
STAGE 4: MIGRATION

AUTOMATE TO WIN

Typical on-premise migration scenarios involve the laborious process of procuring new servers, storage, and infrastructure for the data center. To account for peaks, you must buy hardware and software configured to meet the highest-level of performance you might need. If you fail to account for peak performance, you’ll need to buy even more, and risk longer, costlier delays — and missed opportunities.

Of course, this is not the case with the cloud, where infrastructure and resources are available at a moment’s notice. In fact, to achieve the promise of the cloud, being able to scale up and down based on usage and performance need with speed and ease is essential.

If you’re still thinking of the cloud as a location to put your data and applications, stop. **Cloud is a model, not a place.** It’s a wholly different way for IT to operate and your migration needs to be viewed through that lens.

*When migrating workloads to the cloud, deploy for the valleys or low-points in application use. Use automated scripts to scale if or when that usage peaks. Can’t do that on-premise, can you?*
AUTOMATION IS THE KEY

You can’t go to the CFO or CIO for $100 every time you spin up a new virtual machine. Similarly, lines of business can’t be able to go around spinning up cloud workloads without any eye on costs. Once again, having good governance is critical.

Achieving the agility and time-to-value that you’re turning to the cloud for also requires the use of sophisticated scripting and automation tools. Luckily, the cloud offers automation tools that far exceed the ones that exist for on-premise virtualization solutions.

*If you aren’t automating the provisioning of your cloud infrastructure, maintenance and updates, you are missing the very point of cloud.*

**Script the infrastructure.** Using the sophisticated automation, scripting engines, and templates offered by cloud service providers lets you quickly migrate your applications to the cloud and scale them as needed. Your deployments will happen faster, your application migrations will be less prone to error, plus it will let you take full advantage of the benefits of the cloud.

**Automate maintenance and updates.** Despite what some believe, the need to maintain and update applications doesn’t go away when they’re on the cloud. Third-party tools such as Puppet and Chef allow you to configure automated updates in the cloud so they have virtually no impact on the production environment. For example, you can simply add virtual machines to update applications without touching your production machines—that is, of course, until the updates are completed.

**Governance automation.** IT often doesn’t have enough time to effectively police cloud use or every request for cloud resources. It’s not realistic to think you can manually address all the issues that crop up when you migrate workloads to the cloud. Automating aspects of your cloud strategy makes your life easier and is a major component of good operational governance. You can define criteria to automate repetitive or time-intensive tasks, schedule workload shutdowns and, importantly, control consumption (and spend).
In-depth advice

For a more detailed look at how automation can be a game changer for your cloud migration check out our article Cloud automation: Closing the innovation gap.

Think you might need a cloud managed service provider but need help picking the best MSP for your needs, read our article: 3 Reasons You Need A Cloud Managed Services Provider.
REFINE, REFINE, REFINE

The work doesn’t end when your applications are on the cloud. Once you have successfully moved to the cloud and achieved some degree of operational normalcy, it’s now time to go a step further and refine your deployment.

Thanks to constant competition between service providers, prices drop far faster than they do with on-premise infrastructure. As well, the pace of new technologies and methodologies coming to the cloud is relentless, and each new improvement and iteration offers the opportunity to improve performance, reduce costs and improve compliance.

In a mere matter of weeks, by making the right choices to optimize your cloud deployment you could cut associated costs by more than 20 percent and it just keeps getting better.

COMPLACENCY IS THE ENEMY OF VALUE

Maximizing value from the cloud requires being aware of usage and traffic patterns and constantly looking for ways to do more with less. A workload that costs $1000 in its first month, could actually cost as little as $200 per month in its third year.

By building business logic into your decisions around consumption and right-sizing, you can automate the changes needed to your cloud environment. Automation is the key to preventing complacency.

This comes back to good governance (again) and the use of tools that provide greater visibility such as a usage dashboard, as well as Artificial Intelligence and business intelligence tools.
A FULL-TIME JOB

As much as the cloud and automation free up time from administrative tasks, staying on top the multitude of rapid changes that will affect your organization takes a lot of time. You must monitor usage and performance on levels never seen in the past. Fortunately, there are tools and services to help with that monitoring.

In the on-premise world, compelling events for change might happen annually or, more likely, once every three years. In the cloud, there may be a new opportunity to reduce waste, or some technological challenge to address, or even a challenge that’s become simplified, in any given week.
Below, we've included a screen grab of the Softchoice Cloud Usage Dashboard, our solution for continued visibility into cloud programs. We’ve taken all our tips from this guide and put it into one powerful tool. Here’s the tools you’ll have access to:

01. Softchoice TechCheck Assessment
   clients gain a unified view of on-premise assets in the environment.

02. Drill down, visualize and report on unique scenarios such as geography and organizational units.

03. Customizable rollup of multiple cloud assets tailored to your specific needs including health, usage and potential risks.

04. Single View for Multiple Cloud Environments

05. Consolidated Reporting

06. Application Provisioning

07. Pulls data together real-time from a client’s tenant via vendor API’s

08. Cloud Reporting Integration

09. Product Integration

10. Integration with services such as Office 365 to activate cloud services and allocate features based on individual user, group or other characteristics.
BUILD AND EXERCISE YOUR SELF-SERVICE MUSCLE

To see the agility you expect from moving to the cloud, change the process of requesting IT resources. Developing self-service capabilities within your organization through automated provisioning and a service catalog is also recommended.

Licensing: Don’t pay twice!

In addition to monitoring traffic and performance, you need to pay close attention to your enterprise software license agreements. Many instances of cloud software embed licensing into the cost, meaning you could end up paying for the software twice. Traditional license management tools don’t spill over to the cloud. You need someone with an understanding of licensing to remain vigilant or you could be overspending.
KEEP SECURITY TOP OF MIND

Security issues in the cloud never go away. (Or on-premise for that matter.) Fortunately, thanks to automation tools on the cloud you can solve many security issues with the click of a mouse. Don’t forget, though, someone must still be mandated to look after them. Security, just like cloud traffic and performance, isn’t a case of set-and-forget.

Diligence around security is non-negotiable even in the shared model of the cloud. Most on-premise security vendors have expanded to have versions of their solutions available on Azure or AWS, including firewalls and encryption tools. Still, your data remains 100% your responsibility.

New threats, new technologies and even new regulations are persistent concerns with which to contend on the cloud.

More to consider

Need help knowing where to start with cloud security? Download The Path to Cloud Security is Through Automation and find out.

Looking for optimization tools? Both Microsoft and Amazon have tools and templates to help. Check out the Microsoft Azure Advisor optimization tool and AWS Trusted Advisor.
HYBRID IT STAGES OF ADOPTION

1. GAP ANALYSIS
   - Detailed Inventory
     - Multi-Cloud
     - Cost Estimate
     - Recommendations

2. GET MOVING
   - Production Workload
   - Cross Functional Team
     - IT Ops
     - Support
     - Security
     - Finance
     - LOB
   - Deploy
   - Review
     - Process
     - Skills
     - Tools

3. PLAN
   - Application
   - Roadblocks
   - Risk
   - Suiteability
   - Shift
   - Upgrade
   - Remain
   - Replace
   - Modernize
   - Architecture
   - Cost
   - Priorization

Connect with us today. 1.800.268.7638 | www.softchoice.com
IN CLOSING

Migrating to the cloud is an ebb and flow process. You’ll transition in and out of these steps as you go through your journey. Our 101 guide is meant to familiarize yourself with the steps, what’s involved in and provide you with a deeper dive into particular topics to help you build your foundational knowledge.
READY TO MAKE A SMARTER MIGRATION TO THE CLOUD?

Get the skills, roadmap, and ongoing support you need to ensure success.

The Softchoice Public Cloud Accelerator is the only service of its kind to include the migration of a production workload along with the staff training, tools and ongoing support you need for long term cloud success.

The Cloud Accelerator Includes:

- **Full Day Educational Workshop:** Learn how to select the right cloud services and more.
- **Cloud Architecture:** Understand the reference architectures, automation and infrastructure-as-code to build your environment.
- **Workload Migration:** Certified Cloud Engineers complete your migration.
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