

Collaboration: The Key to a Successful Atlassian Cloud Migration at Croesus





Company Details

Industry: Fintech for wealth management advisors

Company Size: 180 employees

Location: Montreal, Quebec and Toronto, Ontario, Canada

Cprime Services: [Atlassian Migration](#), [Cloud Consulting](#),
[Software Licensing](#)

The Challenge and Opportunity

Croesus leveraged on-premise server-based instances of Jira and Confluence and saw the need for a change. They reached out for guidance and selected Cprime as an advisor and migration partner who could provide a full suite of services, knowledge, and experience, and could work closely with the Croesus team in an Agile environment. Cprime Canada excelled in that partner role as we were aligned on budget, timelines, and team agile mindset.

Overview

Croesus has spent thirty years building a solid international reputation based largely on its cutting-edge proprietary wealth management software solution. Their clients account for over a trillion dollars in assets managed with the system, so their development team has a heavy responsibility to maintain continuous security and efficiency.

As a staunch advocate of Lean/Agile development practices, the Croesus development team relies heavily on Atlassian products, Jira and Confluence, to support their planning and day-to-day operations. Seeking the enhanced reliability, security, and functionality available on the Atlassian Cloud platform, they determined to undertake a migration to the cloud. We had a GO!



Cprime Canada enjoys a position as the leading cloud migration partner with hundreds of successful migrations under our belt. But, according to Guillaume Girard, CTO-VP Software Engineering at Croesus, that wasn't the key deciding factor when he chose to partner with Cprime.

"Cprime advocates Agile and DevOps principles; that's how they approach each project and journey. I knew that we'd be able to partner closely with Cprime without having to sacrifice our internal processes or be a burden on the team. They could meet us where we were, empower the team, and share that knowledge in terms of workflow, making for a smooth and successful migration."

Marie-Christine Legault (M.C.), Cprime's account liaison and Head of Canada, concurs. "It was important from the start for us to work with a practical and actionable plan for Croesus. We wanted to ensure workFLOW and that we worked as ONE unit with our Migration Team and the Croesus Team. We could adapt schedules and key steps to accommodate each member of their migration team in a trustful manner."



The Solution

Over a three-month period, Cprime and Croesus collaborated to complete a successful migration to Atlassian Cloud and licensing agreement. And, we put together a wonderful world renowned roster of guest keynotes and Cprime speakers for an insightful DevOps/Agile full-day event for employees.

Communication was key

One of the first steps in the process was to set up a Google Chat group including all members of the Cprime and Croesus teams so we could work closely to accommodate professional and personal agendas. This was key for maximum efficiency and real time management for all.

“The chat group was instrumental in maintaining communication and transparency from the start,” M.C. Legault says. “Everyone felt free to ask questions on the fly and this allowed us to make decisions that shortened the time frame, lessened risk, and gave visibility to all. The chat brought us together as one unit for the duration of the project and beyond. We got along well — a true international collaboration as we had our expert teammates working from our four Cprime Global offices.”

Starting with a good cup of coffee, we planned a great strategy

The initial conversations were followed by a lightweight assessment to ensure a thorough understanding of the client’s existing systems and how they interacted with the data. Yevgen Lasman, an Atlassian Tools/Migration Specialist with Cprime, recalls, “Croesus was working with a few instances of Jira already in the cloud and one on-premise. So, we developed a migration strategy that would begin with a consolidation, a testing timeline, then a full migration of all data to the new cloud instance.”

Incorporating add-ons

They also relied on a few Jira add-on applications that had to be factored into the plans. Chief among them was Xray, which they were using for test management. Since Xray is available on the cloud, the add-on data could be smoothly parceled along with the main data migration.

Software licensing and BIG savings

Cprime Licensing Team was working behind the scenes and assisted with selecting the optimal licensing options for the new Atlassian Cloud software instances, even finding a way that was more economical for Croesus. They continue to manage the licenses as needed.

A Spring Break migration weekend

With the preliminary planning, consolidation, and test migrations complete, the production migration occurred over the course of one weekend in March of 2022.

Yevgen Lasman recalls, “In the first moments of the migration, we had a few little hiccups that were identified and expected, but we were able to resolve everything safely on the spot. Both teams were all hands on deck for the smooth ride of the migration. When Monday came around, everyone was charged up and in shape.” Job done and high five TEAMS.



Guillaume Girard says, “During the sprint demo, our internal team would highlight a few impediments or little issues that had come up. The teams were always able to resolve everything with Cprime quickly and completely. Challenges were immediately followed up with a solid plan for mitigating the risk and moving continuously ahead. **I never needed to fix anything myself or get involved or participate in weekly project meetings; I never had to worry about it or put out any fires**, which confirmed to me that we’d chosen the right partner. As an executive sponsor, that made my job so much easier.”

M.C. Legault agrees. “Letting our teams be hands-on, identifying what needs to be done, and empowering them was at the heart of this partnership. That’s really the value of working side-by-side and becoming one team and listening. We’ve done so many of these migrations, licensing deals, with add-ons and plugins, we’ve truly seen it all. But what needs to shine is our mindset and transparency with the Croesus team ...there is a lot of value when you build a relationship and trustful collaboration.”



The Results

The migration to Atlassian Cloud was completed successfully and rapidly. A solid result is that Croesus has since decommissioned their on-premise servers, lessening internal infrastructure, and is working completely on the cloud platform.

The development team reports a seamless transition with no impact on their workflow, lots of learning, and new skill sets that were shared by the Cprime migration team. Now, Croesus is benefiting from the platform's enhanced security and performance without compromising functionality.

Guillaume Girard concludes, "Cprime Canada collaborated closely with our team, working in an Agile fashion the entire time. Communication, well-being, and transparency were a constant, and any issues were quickly resolved — from technical challenges to scheduling conflicts, and everything in between. We couldn't be happier with how the project played out.



Contributors



Marie-Christine Legault
Cprime, Head of Canada



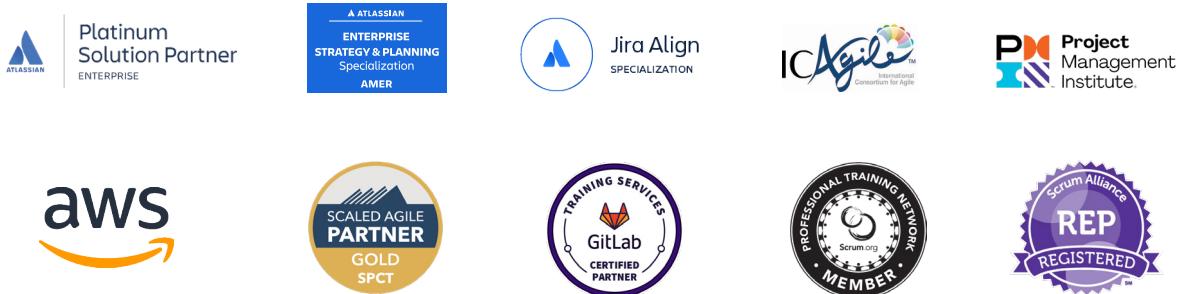
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Cprime Partnerships

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