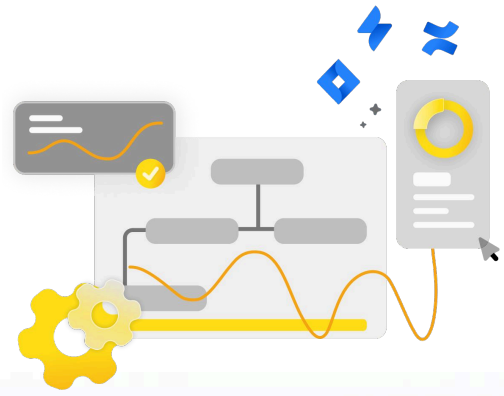


# Cloud migration in the financial sector: strategy & success



As part of its “Cloud First” strategy, a Swiss company in the financial services sector decided to migrate its Atlassian systems to the cloud. This was not just a matter of technical implementation, but a complex change project with high requirements in terms of security, collaboration, and user acceptance. With catworkx as an experienced partner, the challenges were successfully overcome – and today, the team benefits from a modern working environment with significantly simplified operations.

The company has been working with Atlassian products for many years: Jira, Confluence, and Jira Service Management initially ran on servers and later in a data center instance. As part of the company-wide cloud strategy, it was time to switch to Atlassian Cloud—with all the typical challenges that entails: changed features, a new user experience, licensing issues, and coordination between teams and tools.



## Why the cloud – and why catworkx?

The decision to go with Atlassian Cloud was strategically motivated: The development departments were looking for future-proof tools for project management and documentation. Since the company had been working with catworkx for many years, it made sense to carry out the migration project together.

Trust, expertise, and personal support—including at a meeting at Atlassian Team '24—formed a solid basis for the collaboration.

## The solution: part of the team instead of external consulting

The key to the project's success was an unusually integrative approach: a catworkx expert was integrated directly into the customer's development team for several months – with a clear division of tasks and deep integration into the agile processes (including daily stand-ups, retrospectives, backlog refinements, etc.).

The expert took on central roles, for example in the coordination with Atlassian and third-party manufacturers, in the development of the migration path and in the assessment of security-relevant requirements. This involvement not only created dynamism and progress, but also trust - both internally and externally.

## Secure in the cloud: challenges solved together

Connecting to existing security solutions was particularly challenging, such as integrating Microsoft Defender for Cloud Apps to secure the interface between the company network and the cloud. Even for Atlassian, this was an unusual undertaking and a scenario that had hardly been tested before. This made close communication between all parties involved all the more important: catworkx, Atlassian and the customer team worked closely together to develop a viable solution.

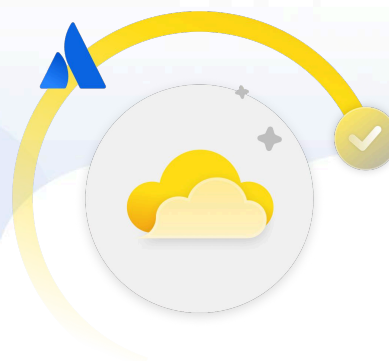
Atlassian provided numerous functions to ensure compatibility across the middleware used.

Despite strict regulatory requirements, the migration was completed and full functionality was ensured, including access to new cloud-exclusive features such as whiteboards and goals.

## The results: relief, innovation, and a scalable platform

5,000 seats were successfully migrated to the cloud. The three-year license agreement is worth USD 2.5 million. The customer's internal Atlassian team now benefits from significantly reduced maintenance costs and can focus on productive use and further development.

The collaboration with Atlassian was also described as constructive and cooperative – a decisive factor in the successful implementation.



## Outlook: Focus on new features

Now that the project has been completed, the internal team is continuing to work independently and is now focusing on expanding usage in a targeted manner: Cloud-specific features such as whiteboards and automated targets are becoming more important.

During the migration, no additional automation or apps were introduced deliberately – now there is room for further development.

## Conclusion

Migrating to the cloud was a significant step for the financial services company, involving many different aspects, from technical implementation to sensitive security issues. Thanks to close, integrated collaboration with catworkx, the project was not only successfully completed but also firmly established within the company. This is an example of a partnership in action, genuine expertise, and the power of integrated solutions.



## The requirements

- Migration to the Atlassian Cloud in compliance with regulatory requirements
- High demands on data security, compliance, and auditability
- Strategically aligned IT transformation in the international financial environment

## The solution

- Close cooperation between the bank, catworkx, and Atlassian
- Detailed analysis of existing systems and regulatory framework
- Development of a customized migration strategy with a risk-minimizing approach
- Technical implementation including security and governance concept

## The benefits

- Successful cloud migration in a regulated environment
- Compliance with all regulatory requirements for compliance and security
- Significant reduction in operational IT costs
- High level of acceptance among specialist departments thanks to seamless transition