

# CDW & SPENCE: KEEPING PENSIONS PROSPEROUS WITH CLOUDPLAN®



## Overview

### Client

Spence & Partners

### About Spence & Partners

Spence & Partners is a leading provider of pension audit services providing expert consultancy and actuarial advice to employers, trustees and pension plan members across the UK and Ireland.

### Overview

As an expanding business, Spence & Partners faced a constant challenge in ensuring its IT provisioning kept pace with the business. Outgrowing its on-site infrastructure and running into issues with its virtual desktop environment was becoming all too common. CDW helped Spence & Partners via CloudPlan, a bespoke IT assessment and consultancy service which highlights the business and facility need, then makes accurate cloud platform recommendations to suit the organisation.

Spence & Partners is actively planning its cloud migration journey, so they can begin to enjoy all the resilience, security and continuity of service that a cloud model provides.

## Client

Spence & Partners is a privately owned, UK firm of pension consultants, actuaries, pension scheme IT specialists and administrators. Providers of a range of pensions and benefit audit services, their work is inherently technical, making IT systems a critical factor in the firm's success. The company consults on over 50 pension schemes and advisory services, to 100+ trustee boards, and the company's technology footprint has had to expand on a continual basis to accommodate this workload.

## Business Driver

Due to Spence's rapid expansion, it faced numerous challenges with the provisioning of its IT infrastructure; the significant upfront investment in hardware based on predicted growth, the maintenance and operational tasks associated with managing its existing infrastructure, and the planning of future technology use to provide the best service to customers whilst maintaining a competitive edge.

The decision was made that further investment scaling out existing hardware didn't fit with the future vision of Spence, and that a migration to a cloud platform should be explored and evaluated. Without a dedicated IT team within the firm, Spence lacked the experience and expertise to make an informed decision about the various options within each cloud platform available to them.

## Working with CDW

Spence & Partners had a pre-existing relationship with CDW through the implementation of its Disaster Recovery Service, ServiceWorks Assure. Very happy with the existing service level and competitive price point, CDW was the logical choice of trusted advisor for Spence's cloud migration plans. Lisa Algje, Head of Business Support & IT at Spence, explains:

**“I found the experience of working with CDW particularly interesting, the information that was presented gave us a lot to think about and an opportunity to plan our strategy for the future with a detailed document clearly articulating key issues we are facing and opportunities for improvement. This was presented alongside realistic costs and timeframes to achieve these.”** – Lisa Algje, Head of Business Support & IT

## The Solution

CDW assessed Spence & Partners' needs and recommended CloudPlan®, a structured cloud engagement model which incorporates all the areas required to design, implement, migrate and operate an

organisation's critical business operations via the cloud. Using CloudPlan, CDW conducted an initial workshop with Spence & Partners key staff, to understand the aims of a migration and gain an understanding of its current situation and environment.

Following this initial engagement an assessment was run over an agreed monitoring period to gather essential data on existing business services and servers including performance, utilisation and to identify consolidation opportunities. This enabled CDW to develop an accurate cost profile for hosting the Spence & Partners environment within all of the major cloud platforms, as well as in its own; ServiceWorks. By providing Spence with accurate costs and instance sizing based on actual utilisation, CDW ensured that submitted costs were realistic, rather than optimistic once the selected platform was live and running.

In addition, Spence & Partners' existing environment was assessed, with pricing and migration plans provided for both a simple cloud transition and a conversion to a full "desktop as a service" platform such as Citrix XenApp on Azure, AWS Workspaces and CDW ServiceWorks Desktop. A comprehensive report was presented, containing vendor agnostic advice on the relevant platforms; detailing cost effectiveness, simplicity, speed of migration and ease of management.

### Benefits

The report and presentation that CDW has produced for Spence and Partners has given them the ability to make an informed decision on how best to move away from their traditionally hosted platform.

CloudPlan® has enabled Spence & Partners to have a clear understanding of migrating to the cloud, providing clear approaches and costs and helping highlight hidden costs often associated with a cloud migration. Migrating to any cloud platform is a complex task, with many moving parts and challenges around connectivity, latency and management; CloudPlan® has enabled Spence and Partners to begin the migration process by providing them with the key information required.

Without this information, a migration to the cloud can appear simply too expensive to start or worse, once the migration has begun, the spend can quickly become far more than the budgetary figure expected and the project viewed as a failure.

**“The time that was spent with us to present the findings and offer advice with a vendor neutral outlook was one greatly appreciated and extremely useful to our business.”** – Lisa Algie, Head of Business Support & IT

Spence and Partners had no specific preference for one cloud platform over another, so CDW were able to present all options equally with advantages and disadvantages for each. Costs were clearly presented so savings could be demonstrated. Spence and Partners were provided with:

- Summarised CxO statements and strategy on Cloud adoption
- Provided Cloud cost comparison (Azure, AWS, Google Cloud Platform, ServiceWorks)
- Compatibility issues
- Optimised Instance Mapping
- Migration timescales
- Migration costs
- Managed Services Cost (Azure, AWS, ServiceWorks)
- Next steps to design and migration

### What's Next?

With the assistance from CDW, Spence & Partners now have the information they need to down select their choice of cloud platform. Once selected, the detailed planning and design of both the migration process and the platform can begin.

For more information or to discuss your requirements, speak to CDW:

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