

## ► Farrer & Co: Lessons learned from shift to IaaS in Azure

Just over 18 months ago, Farrer & Co began a project to move its entire infrastructure into Azure - becoming one of the first UK law firms to do so.

Having broken that news first-time round, we recently caught up with IT director Neil Davison and head of IT systems Andy Beech, as well as Nick Martin, managing director of cloud consultancy SystemsUp, to find out how the project is panning out. Has each of the stages gone as expected? What have been the unexpected challenges? We expected there would be a few bumps in the road and, of course, there have been. But have they been overcome, and if so how?

### The plan

As a quick recap, in around November 2017 we spoke to Davison and Martin about shifting Farrer's infrastructure to the cloud. The plan was move to a secure Microsoft Azure hybrid cloud platform and a desktop environment based on Office 365 and Windows 10, broadly following these three phases:

- Phase 1 - Instruct system integrator, SystemsUp.
- Phase 2 - Move to Azure after completing due diligence and information-gathering within the firm. Under this phase the firm was to move to Exchange online. Davison told us: "We have a hard deadline in that our disaster recovery site shuts down in March and we want all our core systems replicated by then, including getting Active Directory into Azure and putting Exchange online." SystemsUp was working on putting the new desktop build in by the first quarter of 2018.
- Phase 3 - This is the desktop piece and Davison told us back in 2017: "That's where we transform how they work. We're already looking at new build Windows 10 Office 2016 desktop next year and we're looking at new hardware". That includes Surface Pros among "other options". The firm will be using Skype for Business as part of Office 365. Farrer already was already using SIP telephone in the cloud so can readily transfer those numbers to Microsoft.

### Migration

Speaking to Legal IT Insider, Beech said that migration to Azure took "lots of planning". He says: "SystemsUp have been engaged from the start, so we did a lot of thinking about what we're trying to achieve from the off and it became evident fairly quickly that it would have to be 'lift and shift' of everything in one hit. We

looked at a staged migration over time but many of our applications and services are integrated. There was too much of a risk of moving some services here and some there".

SystemsUp mapped out which systems talk to what using Azure Migrate (there are lots of tools available to help you get onto the platform) and while they would normally stagger a migration, Davison told us: "We're the first law firm to do this and the complexity was so great that the map was too big to print out so they couldn't use a normal approach".

Martin adds: "From a sector point of view, there isn't another that has as tightly integrated applications as law firms. A law firm is underpinned by a set of interconnected applications whether that is finance and CRM and workflow or whatever it may be, it is more tightly integrated than any other sector. So, take local government where they have all sorts of streams for social care and highways and finance and none of it is connected but in legal it's all tied in."

The reasons are many, but Davison said: "Lots of law firms have through merger different software and systems. They have a system they don't want to stop using to knit it together with others".

In any event, Beech concludes: "A decision was reached early on that, rather than starting small, we'd have to go full fat from day one. We spent a lot of time and lot of effort with the guys from SystemsUp to understand our estate and where the challenges would be".

Key was ensuring that data was encrypted and secure and Beech says: "The solution we have in place is an express route connectivity to connect us to Azure - a private connection between us and Microsoft's data centre encrypting data across channels using Silver Peak Unity EdgeConnect SD-WAN" which, Beech says, was "another thing that fell into place after we started testing".

He says: "We had some performance issues with legacy applications and having done testing we were satisfied that it was do with our application architecture. We needed to make sure services were at least as good as on-premises and Silver Peak ticked the box".

Davison adds: "Certain legal applications are not designed with this in mind and struggle over an external link. We spent thousands of hours testing performance and functionality to make sure the applications did what they should. What came through early was performance issues with certain systems that weren't up to it. We spoke to the suppliers and they didn't have a solution. We had to go and look at what we could solve ourselves".

Eight weeks before go-live, panic began to set in. Davison continues: "We spoke to SystemsUp about WAN optimisation and the big player making inroads with their AI build is Silver Peak. They look at apps and are constantly optimising. Eight weeks before go-live, I knew we couldn't go live. Silver Peak is plug-and-play and, in a matter of days, some of our systems were working quicker than on-premises".

Martin said: "Any system will run in Azure but key is

the user experience: Farrer & Co focussed on that heavily. The backend is still clunky but modern technology has been applied to build an excellent UX - it's like a gold-plated band aid. The team focussed on what the UX needed to be rather than the underlying tech".

Of the last few weeks before go-live, Beech recalls: "God there was so much happening! We spent the last few weeks testing the heck out of everything. By then we were reasonably comfortable that we had done everything we needed to do". In an unprompted vendor plug he added: "SystemsUp is a really good resource, they really know the platform and understand us, how we work and operate and how our systems hold together technically so they helped with the final stages of the migration".

During that phase SystemsUp also provided training to the IT team and Davison says: "Even the service desk people needed training, so they had enough information to know what we were doing and to answer those questions".

Martin says: "Farrer saw very early on that training across all roles would cement the chance of success. There is a distinct difference between the stance this team takes and other firms. It makes a significant difference".

Prior to migration, SystemsUp had helped Farrer & Co to build a test environment and Beech says: "It was a replica of our production environment in Azure so we

could do a lot of testing in there and get comfortable that it was going to be okay".

For the actual migration Farrer had dedicated onsite resource from SystemsUp and used a lot of comms internally to communicate the fact that the system would be offline over the weekend.

Beech says: "We started on Friday evening by taking the system offline and completing the replication in Azure and executing the changeover. Honestly, we had some of our core systems back up and running by 7am on Saturday morning.

"Obviously we did more testing and had engagement not just from IT but from key stakeholders across the firm. Stakeholders for the practice management system and client relationship management system came in to measure that they were happy with the systems operationally and that they were doing what they should be doing. We did have a line in the sand and if there were any issues we would need to think about reversal - we had a contingency plan but everything went really well. The execution was amazing".

#### Lessons learned

So, what were the lessons learned from the shift to Azure?

Davison says: "It was more resource intensive than we thought it would be". You can tell when he says it, that this was a big deal.

Beech adds: "We knew it was going to be a monster project, but we have spent hours and hours whiteboarding and talking tech".

Both are on balance positive and Davison says: "We now have a pure OpEx model and it gives us improved security, agility, compliance, disaster recovery. While we have increased our spend in some areas, in others it has decreased: third party products come as part of the Azure suite. Our disaster recovery costs have gone and become part of the Azure tenancy".

Farrer didn't expect the move to Azure to be a cost-saving but the RoI will come, they say, over the year, adding: "If we'd had to rebuild our datacentre we would be looking at £2m".

Yes, it was a big project and Davison says: "We didn't realise how big it was", but the result is good.

Davison says: "Our journey started with NetDocuments and looking at cloud services and once you're comfortable with your documents being in the cloud it becomes a natural progression. It's about getting the partners to understand the reasons, not just in terms of cost but also security".

He adds: "In terms of staff, there's a lot of information they need to learn and it's going to be busier than ever to make use of what is in Azure. There are a lot of other projects we can now hopefully deliver more quickly now we're focusing less on our infrastructure".

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