

# Global Financial Services Case Study

## Like-for-Like Migration from a Major Competitor's CIAM Platform to the Ping IAM Platform

### Client Overview

- Business and Compliance requirements at a global Financial Services firm dictated the replacement of a heavily-customized, CIAM platform based on a non-supported version of a competitor's access platform. After three failed attempts, and millions in outlays, the approach of modifying legacy applications to work out-of-the-box with a CIAM vendor was deemed technically nonviable and too expensive.
- The client changed course and engaged CrossGEN, leveraging our collective WebSphere, ForgeRock (Ping) and legacy vendor's consulting experience, to assess an innovative approach. We proposed a Ping-based solution that provides like-for-like authorization and external authentication capabilities to satisfy business requirements -- with minimal application changes.
- Modules of Ping/ForgeRock deployed:
  - Access Manager Version 7.3.0 (PingAM)
  - Directory Server Version 7.5.0 (PingDS)
  - Identity Gateway Version 2023.9.0 (PingGateway)
- The competitive legacy CIAM platform serviced Wealth Management applications supporting 5 million named customers and is based upon the following Middleware:
  - WebSphere Application Server
  - IBM Business Process Manager
  - HCL Digital Experience (Portal, Content Manager)

### How Our Consultants Helped

- Analysis and Solution Strategy
  - Analysis and codification of Baseline IAM Platform; solution architecture, components and capability map, integration patterns, application integration, user authentication models, session management, authorization models, and LDAP directory.
  - Proposed Phase 1 Target State Architecture.
- Capability Prototype – CrossGEN's "Secret Sauce"
  - Created IP, codified in an abstraction layer interface between Ping and Enterprise applications. This enables the *like-for-like* migration. Minimal changes were required of the legacy CIAM applications/middleware.
- Migration Roadmap
  - Deployment of Target State, Transition Steps, Migration Strategy for Re-Platforming Phase, De-Provision Legacy IAM Platform.
- Solution Delivery
  - Milestone-based contract spanning: Solution Design, Solution Development, Solution Testing, Solution Deployment, and Solution Transition Support phases.
- Deployment Environment
  - Ping products initially deployed through DevOps in Azure Kubernetes Service, using Istio, GitHub and Ping ForgeOps templates as the core of the configuration and deployment approach.
  - Client switched to a self-managed VM-based environment in Azure, based on product roadmap shift.
- Knowledge Sharing
  - >30 documents spanning prototype result reports; solution, component design & functional specifications; DevOps deployment; security hardening & component tuning plans; functional test cases; migration plan; test strategy & skills transfer plans; artifact repository, comprehensive solution design documentation, etc.

### Results

- Production Go-Live on July 15, 2024
  - 1.3 million active daily users
  - No Service Incidents with Ping or CrossGEN's IP
- One of Ping's largest competitive migrations
- Benefits of like-for-like approach:
  - Migration to Ping and sunseting the competitive platform accelerated by 18 months
  - Annual Operations Savings of \$500k -- \$750k when redeployed on a Docker platform
  - ~\$2 million labor cost savings in project deployment, by virtue of like-for-like migration approach: avoided hiring contractors to document / modify / redesign / test applications
  - Operations team of competitive platform will be redeployed upon decommissioning
- Successfully deployed Ping DevOps Build in DEV, TEST, QAT, and UAT environments:
  - Passed 4 rounds of Functional, Integration Testing
  - Passed all rounds of Performance / Load Testing
  - Passed Security / Pen Testing
  - Passed Failover / Business Continuity Testing
  - Passed Risk / Compliance Review
  - Passed Business Acceptance Testing
- The Ping CIAM deployment is integrated into client's systems management platform, spanning:
  - Backup
  - Configuration management
  - Serviceability log management
  - Audit log management
  - Monitoring and alerting
- Next Steps:
  - Initiate Phase 2 (Target State enhancements)