

# GLOBAL FINANCIAL POWERHOUSE PREPARES FOR AN ENTERPRISE-LEVEL AUTOMATION ADOPTION JOURNEY, SIGNIFICANT EFFICIENCY GAINS, AND A REWARDING ROI OF OVER 250%

## SOFTWARE AND SERVICES

Red Hat Ansible Automation Platform  
Red Hat Consulting  
Red Hat Ansible Training

This global institution is one of the largest financial services companies in the world. To remain at the forefront of innovation, the bank called on Red Hat to help it move from a legacy environment to a more modern application solution. Standardizing on the Red Hat Ansible Automation Platform was the answer. The company was able to drive its cost reduction initiatives by eliminating manual processes, adopting automation practices, and empowering its employees to envision a world of new possibilities.

## FINANCIAL SERVICES

100,000 EMPLOYEES

CUSTOMER SINCE  
**2002**



## BENEFITS

- Realized a one-year ROI of over 150% and a two-year ROI of over 250%
- Reduced costs and increased efficiency via automated vs. manual processes
- Saved hundreds of hours per month across 10+ lines of business
- Leveraged existing Red Hat investments by standardizing on the Red Hat Ansible Automation Platform
- Engaged Red Hat Consulting to ensure training met specific business goals
- Created a community of "Automation Subject Matter Experts" to drive programs, initiatives, and objectives
- Fostered communication across teams in a previously siloed organization

*"The organization realizes that its people are the biggest factor to driving success in digital transformation. With the Automation Adoption Journey, Enterprise Level Automation eliminates mundane manual tasks and offers employees the opportunity to add higher value and innovate faster."*

BRAD DAVIS  
FSI CONSULTING, SENIOR DIRECTOR



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## **AUTOMATION BENEFITS BEYOND EFFICIENCIES**

Although business at this global financial institution was flourishing, the company knew driving innovation, and increasing business agility was pivotal to its on-going success. Investing in people and technology was key to turning the corner on digital transformation. The goal of achieving enterprise-level automation became the roadmap.

The strategy behind the Enablement Program delivered by Red Hat was to focus on achieving measurable business goals – specifically reduce costs and increase efficiency. In addition, the program increased the number of Ansible/Automation subject matter experts across multiple lines of business.

“The organization realizes that its people are the biggest factor to driving success in digital transformation. With the Automation Adoption Journey, Enterprise Level Automation eliminates mundane manual tasks and offers employees the opportunity to add higher value and innovate faster,” says Brad Davis, Senior Director, FSI Consulting.

With Red Hat Ansible Tower already part of its technology arsenal, it made sense to leverage that investment by standardizing on the Red Hat Ansible Automation Platform. This powerful IT automation engine would simplify the bank’s complex environment and accelerate product development. As compared to other considered solutions, the key benefits of the Red Hat Ansible Automation Platform include:

- Favorable cost and licensing
- Easier to use—written in English and uses simple commands
- Meets the bank’s technology requirements and needs
- Vendor agnostic to accommodate a wide range of capabilities across vendors

## **CREATING A COMMUNITY OF SUBJECT MATTER EXPERTS**

Eliminating silos and getting everyone on board with the Red Hat Ansible Automation Platform was the only way the bank could drive shared programs, initiatives, and objectives. Red Hat Consulting and Training took the lead, helping upskill LOB employees and build a team of Ansible/Automation subject matter experts to support onboarding to Ansible Tower and Automation practices.

With more than 10+ LOBs, the scope of training across the organization was quite an undertaking. To create ambassadors, Red Hat identified individuals who had the skills to become Ansible subject matter experts (SMEs). Red Hat trained these employees to become SMEs within their teams and evangelists of automation. When questions arise, Ansible SMEs are the go-to people for answers.

## **TAILORED TRAINING BUILDS TEAM CONFIDENCE**

With the adoption of new tools lagging behind expectations, the bank reached out to Red Hat to design an enablement program that would encourage employees to embrace the new automation technology. The Red Hat team created a custom training solution that mapped to the company’s use cases, such as automated testing, patching, security services vulnerabilities, and mediation.

“The bank understood the value of Red Hat training services and wanted to leverage our expertise to help successfully move employees to the Ansible Automation Platform and to align lessons learned to specific business goals,” explains Marisha Beason, Training Services Manager at Red Hat.

Initially, the Red Hat team provided two weeks of virtual, instructor-led training engagements, which kicked off with Red Hat’s foundational Automation course. This five-day course helped establish the skills needed to manage large numbers of systems and applications efficiently and consistently.

The bank also engaged Red Hat Consulting Architects and Consultants to provide best practices and share cross-industry automation experience. To enable employees to go from the classroom to the real-world, consultants offered hands-on examples of how applying the information learned in training translates to real-world business-measurable objectives and outcomes.

“The automation subject matter experts ended the engagement with our Advanced Automation course. Over five days, the team trained to understand how to use their Ansible skills to manage the environment. This course helped them explore better ways to automate tasks and use the Red Hat Ansible Engine effectively, as well as how to leverage advanced features of Ansible to perform more complex tasks,” says Beason.

### PLAYBOOKS LIGHTEN THE IT WORKLOAD

Ansible playbooks are essentially a blueprint of various automation tasks. Playbooks are the basis for simple configuration management and a multi-machine deployment system, making it easy to deploy complex applications. There’s no need to write custom code. IT lists the tasks needed by writing a playbook, and Ansible enables the systems to execute the commands.

Part of the Consulting team engagement was to help build a catalog of Ansible playbooks and share best practices with the different application teams. Now application teams can create new capabilities by enhancing an existing Ansible playbook or building a brand-new playbook to meet specific needs.

There is an extensive library of Ansible playbooks that the organization can now use to drive its automation at scale practice.

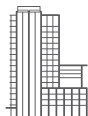
### TECHNOLOGY YOU BANK ON

Usually, making life easier comes at a price. In this case, centralizing and standardizing on Red Hat is paying big dividends. The automation program delivered an ROI breakeven in about seven months, an ROI of over 150% after one year, and a two-year ROI of over 250%.

In the future, the bank has engaged Red Hat to train and mentor three additional LOBs and teams to ensure widespread adoption to maximize its Red Hat technology investment.

### ABOUT RED HAT

Red Hat is the world’s leading provider of open source software solutions, using a community-powered approach to provide reliable and high-performing cloud, Linux, middleware, storage, and virtualization technologies. Red Hat also offers award-winning support, training, and consulting services. As a connective hub in a global network of enterprises, partners, and open source communities, Red Hat helps create relevant, innovative technologies that liberate resources for growth and prepare customers for IT’s future.



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