



FINANCIAL SERVICES CASE STUDY

THE CHALLENGE

Opti9 needed to accelerate cloud adoption for a key customer in the financial services industry.

Prior assessment tools required significant manual effort and lacked granularity — making it difficult to convey how severely overprovisioned their on-premises infrastructure was.

PLATFORM FEATURES

DISCOVER

ANALYZE

PLAN

THE SOLUTION

Opti9 used Cloudamize to conduct a rapid, low-effort MAP Assess. The Cloudamize agent captured highly granular utilization data every 30 seconds, while application dependency mapping grouped infrastructure by complexity for migration waves.

Opti9 leveraged Cloudamize output with AI-driven data enrichment — adding Server Disposition (7R strategy), AWS target services (EC2, FSx), and streamlined security group planning and migration wave descriptions.

Ultimately, ~100% of the on-premises infrastructure was confirmed to be overprovisioned.

THE RESULT

Nearly 100% of on-prem servers had right-sizing opportunities identified

Enhanced planning process led to customer sign-off on SOW

