

# REGIONAL CREDIT UNION INFRASTRUCTURE MODERNIZATION

## CLIENT OVERVIEW

<b>Industry:</b>	Finance
<b>Footprint:</b>	Large Regional Credit Union – BC & AB
<b>Scale:</b>	6 legacy data centers
<b>Details:</b>	Non-standardized IT and security platforms  A small team managing antiquated, fragile, and expensive infrastructure



## THE CHALLENGE

Following a major merger, the credit union faced significant operational and financial risk:

### KEY ISSUES

- **Obsolete technology footprint** with extensive end-of-life systems
- High cost and fragility of **six aging data centers**
- Lack of consistent standards or security policies
- Increasing maintenance burden on a small internal IT team
- Technology debt threatening service availability and future scalability

## THE MISSION

IOSecure delivered **management consulting, technology advisory, and lifecycle services** to guide a full modernization program and implement multi year operational support



# IOSECURE'S MODERNIZATION APPROACH



A regional Canadian credit union faced escalating challenges from aging physical data centers, including vulnerability to obsolescence, mounting operational costs, and risks to service continuity that could undermine member trust and regulatory compliance in a highly scrutinized financial sector.

## First Steps: Strategic Consulting & Technology Advisory

IOSecure was engaged to conduct a comprehensive assessment of the credit union's existing infrastructure, identifying legacy systems, security gaps, and scalability limitations across multiple data centers. This involved developing a high-level cloud and virtualization architecture tailored to Azure Canada, ensuring data sovereignty and compliance with Canadian regulations, while designing an enterprise security framework using Palo Alto Networks to standardize policies and operations. Drawing on these findings, IOSecure crafted a modernization roadmap that aligned with the client's business priorities, emphasizing resilience, cost efficiency, and seamless integration of co-managed or in-house security models.

## Implementation: Infrastructure Modernization & Enablement

IOSecure collaborated closely with the credit union's technology team to deploy the proposed architecture, migrating operations from legacy physical data centers to a scalable Azure Canada environment with integrated virtualization. Standardized security policies were rolled out enterprise-wide, incorporating Palo Alto best practices to enhance threat detection and response capabilities, while providing hands-on support for implementation and operational transitions. Through mentorship and knowledge transfer, the internal team was equipped with the skills and guidance needed to manage the new cloud and security platforms independently, streamlining day-to-day operations and accelerating issue resolution.

## Tracking Client Results

The modernization initiative delivered a future-proof IT environment that eliminated obsolescence risks, boosted agility to meet evolving business demands, and strengthened overall security posture through co-managed support and best practices. Legacy data centers were fully decommissioned, reducing exposure to fragile infrastructure and enabling optimized cloud solutions that enhanced performance, resilience, and cost predictability. IOSecure's strategic approach transformed the credit union's technology stack into a reliable foundation for innovation, empowering teams to focus on member services and long-term growth while maintaining compliance and operational excellence.

## Key technologies





## MEASURED RESULTS



### OPERATIONAL EFFICIENCY

- Decommissioned all legacy data centers, on budget and ahead of schedule
- Eliminated obsolescence risk and enabled long-term scalability
- Developed a **high-level Azure and virtualization architecture**
- Defined the foundation for a modern, scalable, data centre environment



### PERFORMANCE, RESILIENCE & PRODUCTIVITY

- Designed an enterprise security architecture leveraging **Palo Alto Networks**
- Standardized policy sets and security operations
- Enabled co-managed or fully in-house models
- Delivered co-managed security support to the technology team



### COST REDUCTIONS

- Dramatically lowered operational expenses through standardization
- Reduced time spent on troubleshooting and escalations
- Predictable service operations with fewer disruptions



### LONG-TERM PREDICTABILITY & CONTROL

- Worked hands-on with the client's team to deploy the modernized design
- Provided mentorship, best practices, and operational guidance
- Ensured the team was equipped to support the new environment independently

> **6 Data Centers reduced to 0**  
(100% legacy DC exit)

> **+99.99%** Data Center availability

> **35% Reduction** in day-to-day infrastructure management effort

> **40% faster issue-resolution** due to simplified architecture

> **40 – 50% Reductions** in Infrastructure operating costs

> Internal team fully enabled to operate modern cloud and security platforms

> Co-managed security support enabled client to move faster and reduce risk

## WHY IOSECURE?

IOSecure specializes in helping financial institutions transform complex, aging environments into secure, resilient, and future-ready infrastructures. Our integrated consulting and technology services ensure modernization happens smoothly, strategically, and with measurable business impact.



**STRATEGIZE + SIMPLIFY + OPTIMIZE =**  
TECHNOLOGY EMPOWERING PEOPLE, DRIVING INNOVATION

We work with clients to build a clear strategy, scope just the hardware and software required and optimize the technology so your IT stack delivers dependable and secure business results.

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