



# Hear from Your Peers March Meeting

Lessons Learned from a  
Cloud Migration

# Annual Investors



## Thank You



**Meeting Host**



**Thank You**

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# **Trade-Ideas AWS Migration Lessons Learned**

Dave Mabe, CTO of Trade-Ideas

# Dave Mabe

- CTO Trade-Ideas, fintech company that sells software to active stock traders
- Fractional CTO, advise software companies and CTOs how to go faster
- TTEC for 1.5 years

# Background

- On-prem colocation in San Diego
- ~60 physical servers
- 20 different server functions, most of which are custom C++ servers
- March 2022: Data center announces closure, vacate by June 2023

# Decision to Migrate to AWS

- Some minor AWS experience already
- Need flexibility to scale during marketing Test Drives
- Tired of hardware failures
- Key employee would be “unlocked”

# Migration Plan

- Use isolated test account as proving ground
- Evaluate RDS versus MySQL in EC2 Instances
- Once designs officially finalized, create in production account
- More standardization of naming conventions, config consistency



## Problem #1

- Needed to enforce naming conventions, tagging standards

Changed Direction after TTEC October 2022 Meeting:

- Considered AWS Config
- Solution: automated instance creation

```
php create_instance.php --role server_role [--pretend]
```

## Problem #2

- Realized partway through that my team was not prepared
- Lack of experience managing LOTS of servers

### Question for Group:

Have you had a situation where a project was at risk without your HEAVY involvement? How did you handle it?

## Problem #3

Manage cloud infrastructure in one of two ways:

1. AWS tools (there's a tool for *everything*)
2. Traditional non-AWS tools (scripting, OS native tools)

I tend to prefer 2 since:

- Standardized across cloud providers
- Integrates with our devops workflows (github, pull requests, etc)

# Discussion Menu

1. Instance Creation Automation
2. Have you had a situation where a project was at risk without your HEAVY involvement? How did you handle it?
3. Managing infrastructure with cloud-native vs. NON cloud-native tools
4. How do you “plan for unplanned work”?

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# Upcoming Events



**May 18 – AITP/SIM Collab Event**

**August 4 – Hear from Your Peers**