



Rising to the challenge

Home Trust pivots to remote work smoothly and efficiently

by Leah W. Valentine
5-minute read



It was the unluckiest of days. Friday, March 13, 2020. As the COVID-19 pandemic took over headlines and hospitals around the world, Doug Caldwell, Vice President of IT at Home Trust Company, knew the way his company operated was about to change radically.

But he was ready for it.

With what turned out to be providential foresight, Caldwell and his team



had already shifted their company's workload to [IBM Cloud® for VMware](#) platform. So when Home Trust, one of Canada's leading mortgage, credit

card and deposit services institutions, made the decision to send its 1,000 employees home, getting them back to work remotely was a simple matter.

“Moving to IBM Cloud gave us a much more flexible landscape that would scale up or down with our needs over the coming years.”

Doug Caldwell, Vice President of IT,
Home Trust Companies

Spun up to support a
remote workforce in

24

hours

Now supports

1,000

remote workers

A successful, two-phase approach

Home Trust began laying the groundwork for this unexpected transition in 2018. Caldwell explains: “We ran all of our computing out of a primary colocation data center in Toronto and a secondary location in Barrie. All of our infrastructure was coming to end of lease, and we had a decision on whether we spend millions of dollars in capital to buy new servers or we look at the IBM Cloud solution.”

After carefully weighing the options, Home Trust’s decision was clear.

“Moving to IBM Cloud gave us a much more flexible landscape that would scale up or down with our needs over the coming years,” Caldwell explains.



The project began in earnest in early 2019. Caldwell and his team took a two-phase approach to moving Home Trust’s workload to an [IBM Cloud](#) infrastructure

with VMware on [IBM Cloud Bare Metal Servers](#). They started with the non-production environment, which was located in the Barrie data center.

Using the IBM Cloud for VMware solution, Home Trust was able to create a LAN environment between its two data centers even though they were 600 kilometers apart. Then, Home Trust failed over from the Barrie servers to IBM Cloud servers in Montreal. “One minute, the workload was running in Barrie, and the next minute it was running in Montreal,” Caldwell says.

In all, the team transferred data from about 600 Barrie servers to the Montreal data center. “Previously, you would have had to schedule trucks ... put the primary server in one truck and another server in another truck and make sure they went different routes in case there was ever an accident,” explains Caldwell.

Instead, Home Trust was able to complete the migration virtually. “In 10 weeks, we moved the entire workload, and we were able to turn off the lights in the Barrie data center,” says Caldwell.

Moving the production environment was similarly smooth, though it took slightly longer because it had to be done during evenings and weekends. Caldwell explains: “We started the project in July, and we turned off the lights in the production data center at the end of October. Literally 16 weeks to complete that migration.”

A quick pivot

Things were going smoothly as 2020 began. Caldwell expected Home Trust to experience some predictable changes as new projects came up. The flexible new infrastructure would be put to the test, but he was confident that it would spin up smoothly.

And then, COVID-19 made predictability a thing of the past.

“We had tested our VPN solution for critical employees to work from home. But critical employees are a small subset of a thousand users. On Friday the 13th, suddenly it was all one thousand users,” says Caldwell.

Caldwell had planned to upgrade Home Trust’s Citrix infrastructure later in the year, but he accelerated the plan. “We



were able to spin up the new IBM Cloud Bare Metal Servers within 24 hours. In a more traditional environment, if we had to go out and buy a new physical server, that would have taken six weeks to six months.”

Looking back, Caldwell feels fortunate to have made the move to IBM Cloud when he did. “We got lucky. If this

pandemic had hit a year ago, we would not have been able to support our staff or customers. We might have had to look at shift work or other creative ideas to try to get people working and supporting customers,” says Caldwell.

“I’m very proud of what we accomplished in a very, very short period of time,” he concludes.



About Home Trust Companies

[Home Trust](#) (external link) is a federally regulated trust company offering residential and non-residential mortgage lending, securitization of residential mortgage products, consumer lending and credit card services. In addition, Home Trust offers deposits via brokers and financial planners, and through a direct-to-consumer brand, Oaken Financial. Home Trust also conducts business through its wholly owned subsidiary, Home Bank. Licensed to conduct business across Canada, the company has offices in Ontario, Alberta, British Columbia, Nova Scotia, Quebec and Manitoba.

Solution components

- IBM Cloud®
- IBM Cloud Bare Metal Servers
- IBM Cloud for VMware

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Doug Caldwell, Vice President of IT,
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