



## FINANCIAL INSTITUTION MODERNIZES

# IT INFRASTRUCTURE WITH MICROSOFT AZURE

### THE CHALLENGE

A regional financial institution needed to modernize its aging infrastructure to support continued growth and strengthen its cybersecurity posture. Its legacy systems were increasingly difficult to maintain, costly to operate, and created operational risk at a time when the organization was looking to expand services and improve resilience.

Leadership sought to move away from managing physical infrastructure and instead establish a secure, scalable environment aligned with the **NIST**

**Cybersecurity Framework.** Modernization was also driven by the need to improve analytics capabilities, meet evolving regulatory expectations, and lay the groundwork for future strategic initiatives—including potential mergers and acquisitions.

With limited internal cloud expertise, the bank needed a trusted partner to guide the transition and support long-term modernization goals.

### COMPANY SUMMARY

This mid-sized financial services institution, headquartered in the southeastern United States, serves a diverse customer base through commercial and retail banking operations. With approximately 200–500 employees across multiple branches, the organization also manages a portfolio of specialized business units that support a broad mix of financial needs for both individuals and businesses.

As the company continued to expand, its leadership recognized that aging technology was limiting scalability, increasing security and compliance risks, and hindering the bank's ability to innovate. Modernization became essential to sustain growth, ensure reliable service delivery, and support the organization's long-term digital strategy.



**Industry**  
Financial Services



**Company Size**  
200–500  
Employees

# THE SOLUTION

Lunavi led the organization through a structured Azure Adoption and Migration Engagement following the Microsoft Cloud Adoption Framework (CAF).

The engagement began with an Azure Readiness Assessment and Adoption Workshop to define business goals, compliance requirements, and the architecture of a secure landing zone.

✓ Network segmentation and governance policies

✓ VPN connectivity and Azure Firewall

✓ Regulatory-aligned security configurations

Core workloads—including banking applications, Active Directory, file servers, and databases (Microsoft SQL Server and PostgreSQL)—were migrated from two on-premises data centers to Microsoft Azure. A Migration Accelerator phase ensured performance and compliance validation before full production cutover.

To enhance resiliency, Lunavi implemented Azure Site Recovery (ASR) for disaster recovery, integrated with Veeam for hybrid backup, immutable storage, and ransomware protection. Once the environment was fully operational, Lunavi transitioned support to Azure Managed Services, providing 24x7 monitoring, patching, cost optimization, and compliance oversight.

## RESULTS & KEY TAKEAWAYS

The financial institution now operates on a secure, compliant, and resilient cloud platform built for long-term growth.



### Strengthened

security and compliance in alignment with NIST guidelines.



### Enhanced

disaster recovery and business continuity through Azure-native and Veeam-integrated solutions.



### Reduced

operational costs and data center management overhead.



### Freed

IT resources to focus on innovation, analytics, and business strategy.



### Established

a scalable foundation for future acquisitions and digital initiatives.

Lunavi delivered measurable value by guiding the organization through every phase of its cloud transformation. In doing so, we helped a regulated financial institution modernize infrastructure, improve resiliency, and confidently navigate what's next in IT.



## ABOUT LUNAVI

**Lunavi** empowers organizations to navigate what's next in their digital transformation journey. Our solutions include custom AI development, data analytics, app modernization, and managed Microsoft Azure cloud solutions - helping organizations embrace the technologies of today and transform their ambitions into reality. Across multiple industries, Lunavi has led full scale IT transformations and supported teams with everything from datacenter infrastructure solutions to cutting edge predictive AI. With Lunavi by your side, next is now, and the future is yours to innovate. [www.lunavi.com](http://www.lunavi.com)

