

Avalara Partners with Isos Technology to Migrate from Data Center to Atlassian Cloud Enterprise

Avalara is a SaaS company that makes software products and solutions to help businesses of all sizes get tax compliance right. In partnership with leading ERP, accounting, ecommerce, and other financial management system providers, Avalara delivers cloud-based compliance solutions for various transaction taxes, including sales and use, VAT, GST, excise, communications, lodging, and other indirect tax types. Headquartered in Seattle, Avalara has 20 offices across the U.S. and around the world in Brazil, Europe, and India. Its more than 3,300 employees serve customers in 95 countries.



The Challenge

As a SaaS company, Avalara is well-versed in the benefits of managing software in the cloud. The organization is also committed to the use of Atlassian tools. Both their engineering and business teams had used Data Center versions of Jira and Confluence to manage projects for some time. However, like many enterprise organizations, Avalara was drawn to Atlassian Cloud Enterprise for its scalability, 99.95% uptime service level agreement, and top-notch support offering.

One of Avalara's primary reasons for choosing to migrate to Atlassian Cloud was governance. Over time, different work groups within the organization had made use of the tools' flexibility and customized them, including implementing numerous third-party apps. Avalara saw the migration as an opportunity to standardize processes, consolidate apps, and clean up data, so they could work more efficiently, gain better transparency, streamline collaboration, and simplify reporting. They were also seeking enhanced scalability—with so many customizations, their current solution was not scaling the way they needed it to support business growth and dynamic business needs.

No migration is straightforward, and Avalara's situation presented some unique challenges. The company had an exceptionally large number of projects and a significant volume of associated data. It was one of the largest migrations both Atlassian and Isos Technology had encountered to date. Adding to the complexity, Avalara had a tight timeline for the overall migration, and as a software company, service level agreements with their own clients meant it was essential that they limit downtime during the actual cutover. Migrating data takes a certain amount of processing time, and Isos Technology had to strategize solutions and test carefully to significantly condense the amount of time typically needed to physically move such large volumes of data.

The Solution

The Avalara team, led by Brent Hatfield, Director of Global Infrastructure Technology, had already made the decision to move to the cloud and determined that the best way to support their overall business through the transition was through a phased approach: in Phase 1, the engineering teams would make the transition, and the business teams would follow in Phase 2. Next, they needed a partner to help them strategize how to get there. After reviewing several vendors, Avalara chose to partner with Isos Technology on the migration due to their deep experience migrating Atlassian tools, as well as their clear communication style.

After a thorough discovery process, the Isos team developed a detailed migration plan and the two groups settled on a timeline that would address Avalara's need to move quickly and limit downtime, while also minimizing post-migration issues. The migration was a hands-on process that required the use of proprietary tools and custom engineering. Isos rewrote more than 80 complex workflows, then tested and refined them through a highly iterative process, to ensure they would work properly in the new system. Another significant piece of the puzzle included reengineering a critical Salesforce integration, migrating the connection, then reassociating related Jira/Salesforce cases.

Isos also worked closely with Atlassian, identifying opportunities to reduce the time to process data using existing migration tools from as much as 24 hours to as few as six. This was necessary to ensure that the final cutover could be done in a single weekend. Similarly, they worked closely with relevant app vendors to find efficient ways to migrate app data, then tested thoroughly to minimize the risk of issues during the cutover weekend when the vendors would not be available to offer support.

Results and Outcomes

Thanks to close collaboration between Isos Technology, Atlassian, and third-party vendors, Avalara was able to achieve their primary goals for the program: an efficient migration on a tight timeline, with limited downtime and post-migration issues; a solid foundation for long-term, ongoing governance of the tools; and a more scalable platform.

Successful, Streamlined Migration

This was a complex migration due to a high volume of complex workflows, a large amount of data, complex, third-party integrations, and a tight timeline with limited downtime. To meet the client's needs, Isos used custom engineering and proprietary tools; collaborated closely with Atlassian and third-party vendors; and planned and tested thoroughly. As a result, the migration was completed on time, data processing time was significantly reduced so the cutover could be done in a weekend, and the team was able to anticipate post-migration issues and work through them quickly.

Enhanced Governance and Scalability

As they moved through the migration process, Isos Technology worked with Avalara to establish governance and bring all areas of the business into a consistent way of working, including consolidating apps. Now, Avalara can work more efficiently and collaboratively. They also have increased transparency into work being done, can more readily report on it, and are benefitting from enhanced scalability. The governance committee that was established during the migration process continues to oversee changes made to the system, including the introduction of new apps.

The Isos Technology team credits the Avalara team, led by Brent Hatfield, Director of Global Infrastructure Technology, for the role they played in the success of the migration. Their commitment and responsiveness were essential to successfully migrating from Data Center to Cloud Enterprise.



"No migration is the same. Adding to the complexity is that the Atlassian Cloud product and migration toolset are ever changing. Isos Technology had the experience to navigate all of that and make it happen."

—Brent Hatfield, Director of Global Infrastructure Technology, Avalara

About Isos Technology:

Isos Technology helps organizations solve complex business challenges with Atlassian tools and industry best practices to drive enterprise excellence. Whether optimizing service management, upgrading to the cloud, or developing long-term IT strategies, Isos Technology partners with teams to achieve measurable results. As an Atlassian Platinum Solution Partner, Isos specializes in ITSM, cloud migrations, and enterprise strategy. The company has been recognized multiple times as an Atlassian Partner of the Year. Since 2005, Isos Technology has helped Fortune 1000 companies and public sector organizations innovate and build sustainable success.

For more information, visit isostech.com.

Project Snapshot

- Avalara made the decision to move from Atlassian Data Center to Cloud Enterprise to establish governance, increase scalability, and gain enterprise-level support.
- The project was large and presented challenges: it entailed rewriting more than 80 complex workflows and reengineering a critical Salesforce integration.
- The overall timeline was extremely tight, and the final cutover had to be made in a single weekend to minimize downtime for Avalara's customers.
- Isos leveraged custom engineering and proprietary solutions, and partnered closely with Atlassian and third-party app vendors to significantly reduce data processing time.
- As with any complex migration, issues did arise, but through teamwork and communication, the project was completed with limited downtime.
- Avalara now benefits from enhanced governance, which supports efficiency, collaboration, transparency, reporting, and scalability.



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