**Negotiation Context: Finding a Collaborative Path Forward for Lending Grid Server Tech Refresh**

### **Background**

Lending Grid periodically undergoes a server tech refresh to replace existing infrastructure with the latest hardware, aligning with enterprise policies. Historically, this has been a collaborative effort involving the Platform, Capabilities, and Client teams. The process includes extensive stress testing, user acceptance testing (UAT), and a blanket Change Request (CR) to address any production deployment issues promptly.

The next tech refresh cycle is scheduled, with the new infrastructure expected to go live by **June 2025**.

### **Urgency**

The existing infrastructure runs on **Red Hat (RH) 7**, which is no longer supported and is currently operating under an exception. Leadership, specifically Tracy Kerrins, has emphasized transitioning to **RH 8** and decommissioning end-of-life (EOL) servers by **May 2025** to maintain compliance and mitigate risks.

### **Challenges**

Several factors have introduced complexity into this cycle:

1. **Lending Grid Rationalization**
   * Aggressive rationalization initiatives aim to retire **LGEDA** and **LGBAT** by the end of 2025.
   * The target is to migrate all non-HL LGNDM clients to other groups within Lending Grid by the year-end.
2. **Reduced Team Size and Increased Workload**
   * The Capabilities team, once spread across the US and India, now consists of a **five-member team based in India**.
   * Tasks for the tech refresh include:
     + Updating UCD scripts with new server details.
     + Testing applications on the new infrastructure.
     + Securing UAT sign-offs from 92 Lending Grid users.
     + Troubleshooting unexpected issues.
   * Estimated effort: **100+ hours for the Capabilities team alone**.
3. **OpenShift Cloud Platform (OCP) Migration**
   * Enterprise-wide OCP migration is a priority for 2025, creating competing deadlines and resource constraints.
4. **Testing and Sign-Off Delays**
   * UAT sign-offs, now mandatory, are time-consuming and often take longer than a sprint to finalize due to delayed user responses.
5. **Developer Morale and Attrition**
   * The repetitive, high-effort nature of tech refresh tasks rarely garners leadership recognition, leading to reduced motivation, burnout, and attrition among developers.
6. **New CR Process in ServiceNow**
   * The ServiceNow CR process fragments efforts into smaller, redundant tasks. Blanket CRs for swift fixes are no longer permitted, introducing delays and inefficiencies for large-scale changes.
7. **Data Center Exit**
   * The entire platform must vacate its current data center and migrate to a new facility by **early 2026**.

### **Points of View**

1. **Platform Team’s Perspective**
   * The tech refresh is a **mandatory enterprise initiative** and must be completed to ensure compliance with enterprise standards.
2. **Capabilities Team’s Perspective**
   * Focusing on the tech refresh for components with limited life spans, given the **looming data center exit**, seems counterproductive.
   * They propose reallocating resources to client migrations and retiring components as part of the rationalization initiative.

### **Objective of This Meeting**

The purpose of this discussion is to:

* **Empathize** with the challenges faced by both teams.
* **Explore a middle path** that ensures compliance while optimizing efforts in line with enterprise and business priorities.
* **Align** on a collaborative, win-win solution under leadership’s guidance.

Let’s aim to develop a shared understanding and formulate an actionable plan to achieve success together.