CUSTOMER STORY

Octopus Deploy helps Zywave maintain auditability and consistency as they scale

Zywave is a leading insurance technology company with a portfolio of cloud-based sales management, client delivery, content, and analytics solutions. They offer an all-in-one platform with data and a comprehensive content library to empower insurance agencies to make smarter business decisions throughout the customer lifecycle.

More than 5000 insurance agencies use Zywave's software, including 95 of the top 100 US insurance firms. Zywave started in the benefits space and has since expanded its tooling across the other pillars of insurance.

Company
Zywave

Industry
Software

Region
US

Top Octopus features
Step templates, Config as Code, Environments, Variable sets, Feeds

Challenge

Zywave has used Octopus Deploy for over 10 years. The team initially implemented Octopus because their deployments were largely .NET/IIS deployments, and the Tentacle architecture gave them the granular control they needed.

Over time, Zywave has expanded its software offering and made several acquisitions. With new software teams with their own deployment processes and tooling, Zywave's requirements expanded beyond a single space.

Zywave began to modernize from IIS to Kubernetes a few years ago. More recently they have been looking into everything-as-code as a way to scale further to meet the demands of over double the number of teams and a wide range of deployment stacks.

Zywave hoped to bring its teams together with a consistent, easy-to-implement deployment process with access control and auditability across environments.

Solution

In 2022, Zywave re-evaluated its CI/CD pipeline to ensure it could expand with them. Previously running on one server, the team saw the need to scale their capacity. Zywave found Octopus still met its needs for auditability and security and the team could use Octopus's new features to help them scale.

As they expand, Zywave are using Octopus projects to give them flexibility with distinction. Octopus lets them isolate their technology stacks across their product offerings and acquisitions. Zywave then manages access to each stack to meet security and auditing requirements. This allows them to scale their deployments as their business acquires new products.
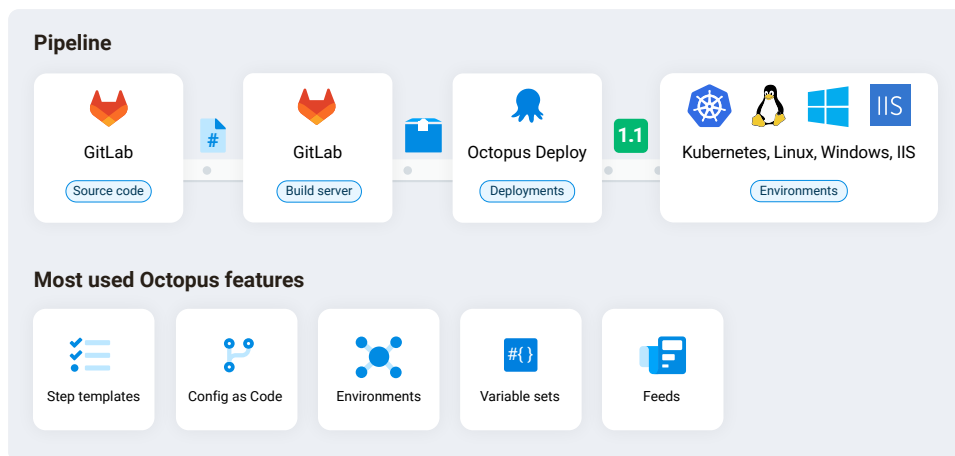
Using step templates also means new products and teams can set up their deployments quickly using repeatable processes. This creates consistency, even when some teams are trying deployment automation for the first time.

To help shape an everything-as-code approach, Zywave also takes advantage of Octopus Deploy's Config as Code solution. For everything outside of Octopus projects, Zywave uses Terraform to configure projects. With up to 95% of their activities in Octopus happening in projects, they use Terraform to control the less-frequent tasks.

"As we scale, we still need the same kind of auditable, access-controlled environments that we had, but with added complexity. Octopus provides the familiarity and flexibility that we need to grow, along with meeting our security requirements. No other tool we looked at really offered the level of control over security and auditing that Octopus does out of the box."

John Cruikshank
Vice President, Engineering

Pipeline

GitLab — Source code
GitLab — Build server
Octopus Deploy — Deployments
Kubernetes, Linux, Windows, IIS — Environments

Most used Octopus features

Step templates   Config as Code   Environments   Variable sets   Feeds

Results

By reshaping its use of Octopus Deploy as the company scales, Zywave has ensured repeatability and reliability across its deployments. As they acquire products and teams at different points in their modernization journey with varying levels of automation experience, Octopus creates consistency for Zywave. Step templates also make it quick and easy to onboard new teams and automate their deployments without re-learning code.

By using Octopus, Zywave meets its compliance and auditing objectives. Projects in Octopus let Zywave control access to deployments to maintain security and provide visibility for auditing purposes.

"Each product we bring on is different, and every team has a different process. The fact that we can store all the steps and patterns improves efficiency. It means we aren't having to reinvent everything every time."

John Cruikshank
Vice President, Engineering

Using Config as Code in Octopus has also helped Zywave move towards an everything-as-code approach without compromising on deployments. Zywave still benefits from the usability of the Octopus UI throughout its CI/CD workflow.

"Octopus gives us the visibility we need, and we didn't want to lose the UI when we shifted to an everything-as-code approach. Config as Code means we get the best of both worlds and don't lose the ease of use of the intuitive UI."

John Cruikshank
Vice President, Engineering

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