



Trust-First Modernization:

The CIO's Blueprint for Resilient Hybrid Operations

Why do most modernization efforts stall?

Introduction

Enterprises plan to spend \$3.4 trillion on IT modernization in 2026, but much of that investment is at risk of falling short. Too often, organizations treat data and security as bolt-ons, addressing them after core projects are underway. This creates friction, rework, and unnecessary risk. Artificial intelligence, which many view as the centerpiece of modernization, can amplify existing issues. A data quality problem that might have affected one dashboard now repeats across the business, embedded into more workflows and surfaced with even greater confidence. The result? More audit scrambles, operational exceptions, and painful recoveries.

Data and security are at the heart of every modernization challenge. In a recent survey, 69% of IT leaders named data security as their top concern, while 52% pointed to access control as a significant hurdle. Too often, organizations fall into the trap of modernizing first and adding controls later — an approach that leads to late surprises, repeated rework, and a costly cycle of documentation that slows progress and undermines trust.

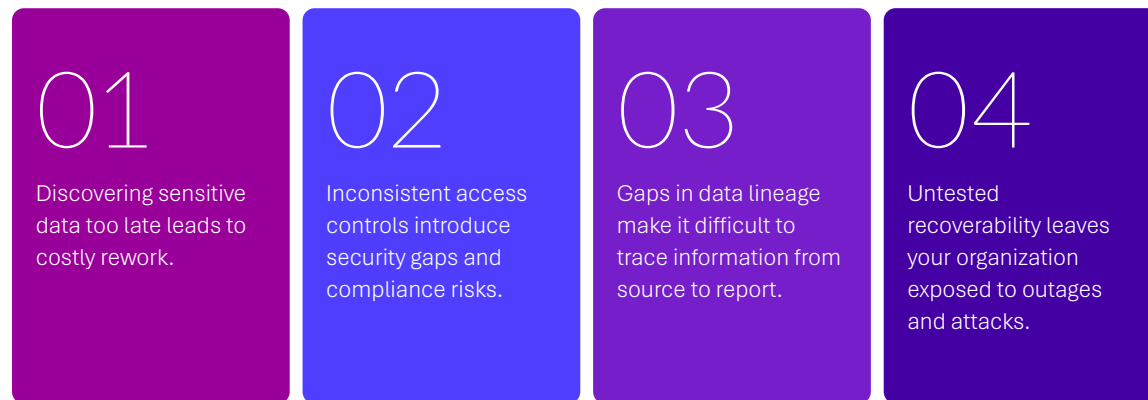
It's time for a different approach. AI isn't the foundation of modernization. Trust is. By unifying data and security as the first step in every modernization initiative, a trust-first approach creates a shared layer of control that empowers every team to move more quickly and innovate with confidence. This white paper offers a practical blueprint for CIOs, detailing how to lead with trust, reduce risk, deliver results faster, and build a resilient, future-ready hybrid enterprise.



The shared trust layer: Unifying data and security

The trust layer isn't another silo. It's a shared capability that provides clear visibility, consistent controls, and built-in resilience across your entire hybrid environment. By unifying data and security, you strengthen the connection between two of your most critical business functions. Security builds confidence in your data, while high-quality data, in turn, powers smarter, more secure operations. Together, they form a solid foundation of trust that underpins every aspect of modernization, from IT infrastructure and application development to unlocking the full potential of AI.

When you move forward without this trust layer, you face the same roadblocks, again and again.



By building trust from the start, you create essential capabilities — like comprehensive data inventory, transparent lineage, consistent access controls, and reliable recoverability — into your architecture from day one. This proactive approach doesn't just prevent surprises; it lowers costs, drives efficiency, and gives you the confidence to modernize without hesitation. When trust is foundational, your investments pay off for the long term, not just up front.



What does trust-first modernization look like in action?

A trust-first approach powers real results across every industry and scenario. By building a shared trust layer, organizations remove common modernization barriers and reach their goals with greater speed and confidence. Here's what that looks like in practice.

Banking: Digital and risk modernization

Goals: Modernize digital servicing and payments, improve fraud and AML decisioning, and enable cloud analytics from core systems like Db2® on z/OS®.

Without trust: Rework cycles, audit fire drills, exception overload, and operational risk are common when data ownership is unclear, and access policies are inconsistent.

With trust-first: Comprehensive data inventory and clear ownership, transparent end-to-end lineage and flow visibility, and standardized access controls minimize duplication and remediation. This approach delivers faster, lower-risk releases and greater confidence in regulatory reporting.

Automated decisioning and AI

Goals: Move critical AI and analytics initiatives from pilot to production with confidence, modernize automated decisioning services, and lower security risk for high-stakes decisions, all without disrupting core systems.

Without trust: Teams contend with feature drift, missing input traceability, and exception overload, which makes decisions hard to defend and increases overall risk.

With trust-first: An up-to-date feature inventory with clear ownership, transparent data provenance for AI training and inference, and policy-by-design for every model, enable faster, safer deployment of production-grade decisioning and tightly managed audit readiness.

Retail: Omnichannel and inventory modernization

Goals: Enable real-time inventory, deliver accurate promise dates to customers, enhance loyalty programs, and ensure resilience during peak periods.

Without trust: Broken customer promises, tool sprawl creating security gaps, and delayed recovery from outages can erode revenue and damage your brand.

With trust-first: Clear data ownership, end-to-end flow visibility, consistent access controls, and policy-by-design support higher conversion rates and minimize "out-of-stock" scenarios. You can roll out new omnichannel features more quickly, with stronger security and less operational risk.

Regulatory reporting and audit readiness

Goals: Meet regulatory deadlines with consistent, reconcilable numbers across hybrid systems, and reduce audit effort with on-demand evidence of controls, access, and change history.

Without trust: Teams face recurring restatements and escalations, manual searches for audit evidence, and inconsistent access rules for regulated datasets.

With trust-first: A complete data inventory with clear ownership, transparent source-to-report lineage, and consistent access controls leads to faster closes, fewer audits, and greater confidence in results. This approach reduces compliance burdens and operational risk.



How Rocket[®] enables trust-first modernization

We meet you exactly where you are on your modernization journey. Instead of approaching data visibility, access controls, and recoverability as separate initiatives, we help you operationalize them together so you can reduce risk and modernize your business at the pace you need.

Our solutions provide the foundational capabilities required to build a unified trust layer across every hybrid environment. In practice, we deliver three essentials for confident modernization:

Visibility

Know what you have, where it lives, and how it's used. Build an authoritative view of critical data across platforms with robust data inventory, metadata management, and transparent end-to-end lineage. This clarity helps you identify your most valuable datasets, map dependencies, and trace data from source to outcome before issues become outages or audit concerns.

Control

Consistently prove who can access what, and why. Centralized access and usage policies integrate seamlessly with your security ecosystem. Strong authentication, credential-aware access control, policy enforcement, and audit-ready logging all work together to protect sensitive data, reduce exceptions, and simplify compliance without slowing down delivery.

Resilience

Assume failure, plan for recovery, and validate results. Trust-first modernization means you must recover critical data and services quickly and reliably. Our tools make resilience part of your daily operations, supporting protected recovery options and reducing uncertainty so ransomware readiness and recovery are proven, repeatable, and never left to chance.

Our agentic AI platform, Rocket[®] EVA[™], makes the trust layer actionable, delivering evidence-backed answers, automated analysis, and guided actions empowering your teams to move with more speed and confidence.



Accelerate outcomes by putting trust first

Modernization isn't optional, but success isn't guaranteed. The conventional approach of treating data and security as afterthoughts imposes a "retrofit tax" on every initiative, leading to delays, increased costs, and persistent risk.

By adopting a trust-first mindset, you change the equation. Building a shared trust layer from the start creates a resilient foundation that supports every pillar of modernization. With this approach, you empower your organization to accelerate innovation, reduce compliance friction, and confidently move from pilots to production. Your modernization journey today is building the foundation for AI-driven capabilities that will unlock even greater value tomorrow. Start with trust, or you may have to start over.

Discover how [Rocket® EVA™](#) and [Rocket® DataEdge™](#) can help you establish a trusted foundation for your modernization efforts. These powerful solutions are designed to streamline your data strategy, enhance compliance, and enable seamless scalability.

[Learn more today and take the next step toward unlocking the full potential of your organization's data-driven future.](#)



About Rocket Software

Rocket Software is a global technology leader in modernization and a partner of choice that empowers the world's leading businesses on their modernization journeys, spanning core systems to the cloud. Trusted by over 12,500 customers and 750 partners, and with more than 3,200 global employees, Rocket Software enables customers to maximize their data, applications, and infrastructure to deliver critical services that power our modern world.

Rocket Software is a privately held U.S. corporation headquartered in the Boston area with centers of excellence strategically located throughout North America, Europe, Asia and Australia. Rocket Software is a portfolio company of Bain Capital Private Equity.



Modernization. **Without Disruption.**[™]

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