

Fox IT assists global insurance organisation with ITSM transformation

Fox IT performs a maturity assessment, defines globally-aligned processes, captures ITSM toolset functional requirements and develops ITSM toolset training materials

This global insurer aimed to transform their service management framework and service delivery capability, introducing consistent working practices across all regions as well as the implementation of a new ITSM toolset.

Background and Requirements

The organisation had undertaken a significant amount of work to rationalise a collection of disparate systems brought about as a result of a number of acquisitions over a period of time. Support functions had also been insourced after three years of being outsourced. Europe and North America were using different versions of the same IT service management (ITSM) toolset, with the Asia-Pacific region using another toolset altogether. As well as these differences the toolsets were not necessarily aligned to the organisations processes, and to compound matters individual regions were also operating processes differently.

The initial requirement was to perform a maturity assessment of the European operation in order to obtain a baseline from which future improvement progress could be measured. There was also a clear recognition within the organisation of the importance of having the right processes and practices in place and wanted to use the output of the assessment as an input for introducing best practice service management across the entire organisation, including the introduction of globally-aligned processes as well as migrating all regions to the same ITSM toolset.

Scope and Approach

Fox IT, with previous experience of assisting organisations with ITSM global transformation programmes, was engaged to perform a number of key activities in support of their client's transformation activities. This case study provides some level of detail of the activities that were undertaken and some of the early benefits that were derived.

ITSM Assessment

Fox IT^{®1} consultants were initially engaged to assess the maturity of the European operation. Using Fox IT's FoxMAPS[™] assessment methodology, the two main operating bases were visited whereby interview sessions were held with key stakeholders (process owners, process managers, process practitioners) in order to obtain an accurate picture of the current activities being performed across 23 different processes within the IT department. This was supplemented by some observation of process activities being undertaken as well as the review of evidentiary material (such as documents and records).

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Head Office

Sentinel House
Ancells Business Park, Harvest
Crescent, Fleet, Hants. GU51 2UZ

Registered Address

Fox IT SM Limited
1 Vincent Square
London SW1P 2PN

Tel : +44 (0) 333 202 1018
Fax : +44 (0) 1252 240033
Email:sales@foxitsm.com

Company Registration Number 7390255
Company VAT Number GB 156 4959 68

The assessment output was a highly detailed report capturing process-by-process observations, clearly identified strengths and weaknesses, prioritised improvement recommendations, as well as maturity ratings and percentage scores. This output identified a number of quick wins, but importantly also provided baseline scores that were necessary if future progress was to be accurately measured.

Benefits

- A completely objective view of the current European operation
- Comprehensive report covering people, process and tool that provided valuable input to the transformation project and other organisational continual service improvement activities
- A detailed set of prioritised recommendations to enable easy identification of quick wins
- Baseline measurements to facilitate the accurate monitoring of improvement progress

Global Process Definition Workshops

The next phase of the transformation programme was to define and agree globally-aligned processes. A key driver for the organisation was to implement ITIL^{®2} good practice across all regions, and for all regions to be operating processes in the same manner. The introduction of a new ITSM toolset became an ideal opportunity to not only undertake this activity, but also to ensure that the toolset underpinned those processes.

Fox IT ran multiple workshops using various audio and video conferencing techniques that enabled stakeholders from all global regions to participate and provide active input into agreeing processes that met the needs of the organisation as a whole, but also the individual localised requirements of the respective regions. With 15 processes to agree and the vagaries of people's time and time zones, Fox IT utilised their FoxPRISM[™] process implementation accelerator tool as a mechanism for expediting the deliverables. Obviously a key responsibility for the Fox IT consultant facilitating the sessions was also to ensure that the organisation remained true to their requirement of implementing 'good practice'.

FoxPRISM provides a set of pre-defined processes aligned to ITIL[®] and ISO/IEC 20000 that are easily customisable to fit an organisation's way of working. For this client, FoxPRISM provided a valuable way of stimulating good discussion and getting to a position of agreeing each globally-aligned process much quicker than would otherwise have been possible. Another benefit of the accelerated timescales for these activities is obviously the savings in effort, time and cost.

Post the workshops, and alongside refined process flow diagrams, Fox IT developed process narratives that provided descriptive text for each activity in the process as well as clearly identifying which role was responsible for the execution of those activities plus the interfaces to any related processes. Again existing FoxPRISM content was used as the basis for developing these narratives in order to hasten their delivery. Later on in the project, Fox IT created additional supplemental material including process policy documents as well as suggested sets of metrics.

All of the content produced was latterly integrated into the organisation's own customised version of FoxPRISM. One benefit of this was being able to give easy access to anyone within the organisation, anywhere in the world, to all of the reference material for the processes being implemented.

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Benefits

- All regional stakeholders had the opportunity to provide input
- Definition and agreement of globally-aligned processes and the production of policies and metrics delivered in reduced timescales due to external facilitation and the use of FoxPRISM content
- Realisation of significant savings in time, effort and cost

ITSM Toolset Functional Requirements

Fox IT's next activity was to assist in the capture of functional requirements for the new ITSM toolset. Maintaining an ongoing reference to the agreed processes to ensure toolset-alignment, workshops were held with key stakeholders and the toolset vendor to determine the exact functional requirements for the processes being implemented.

Requirements were gathered across 11 different disciplines, with Fox IT responsible for not only accurately recording high-level statements and detailed descriptions of the individual requirements, but also provided the vendor with a total of 30 separately documented definitions for the data fields requiring user input or where additional information needed to be presented to the user.

Fox IT facilitated subsequent workshops where global agreement was not initially possible, and maintained the complete set of requirements as changes were made during the course of the transformation programme. Fox IT also worked closely with the vendor to ensure that they had the correct interpretation of the individual requirements, handling their queries as they arose and liaising with the client as necessary. With Fox IT being able to provide the vendor with this business perspective it helped to minimise the impact on the client's time.

Benefits

- Issues with process-toolset alignment were addressed with Fox IT consultant-led discussions that provided ongoing objectivity
- Clear identification of requirements and how they related to their real-world application within the organisation
- The Fox IT-vendor relationship for clarifying queries minimised disruption on the organisation's staff that were busy with day-to-day operational matters

Process and ITSM Toolset Training

Process training

Awareness of the new globally agreed processes was obviously going to be a key factor in obtaining the levels of consistency required, not only for internal staff but also for any third parties interfacing to those processes. Fox IT delivered process walkthroughs to those stakeholders who were not directly involved in the programme but affected by the changes.

ITSM toolset training

Fox IT was engaged to develop the material that would be utilised in training all of the users of the ITSM toolset. Microsoft PowerPoint was used to develop slideshow presentations that individuals could go through at their own pace and at a time convenient to them. Each slideset focused on a particular module of the toolset (such as Incident Management, the Customer Portal, etc.) and provided a clear understanding of how to use the relevant functionality.

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The PowerPoint slides were supplemented by Quick Reference Guides developed using Microsoft Word. These were designed to provide quick and easy access to the key toolset functionality rather than necessarily having to go through the full training slideset again.

Regional subject matter experts/process leads

Fox IT also worked closely with regional subject matter experts and process leads to ensure that they had the right level of in-depth knowledge to enable them to disseminate all of this toolset information to the wider user community.

Importantly for the client, all of the training material developed by Fox IT was integrated into their customised version of FoxPRISM and would become a focal reference point for users, and also a vital tool in the on-boarding of new starters to the organisation.

Benefits

- Training material was developed with a clear understanding of both process and toolset and resulted in a high level of consistency
- Training sessions also benefited from the consultant being engaged at an in-depth level for both process and toolset
- Minimised the impact of the organisation's training personnel so that they could just focus on delivery to the wider user community

Foundation Data

Another vital activity that Fox IT undertook on behalf of the client was the collation and maintenance of 'foundation data' that was to be loaded into the ITSM toolset. Whilst certain data was to be imported from other existing toolsets (e.g. users and email addresses via Active Directory), there was other core data that needed to be populated into the tool via other means, such as:

- Support teams and their members, also mapped to specific toolset roles
- Service categories mapped to support teams
- Change categories, templates, approvals groups
- Email notifications

Fox IT collated all of this data from existing toolsets (where applicable), performed gap analyses to identify anomalies and deficiencies, held global workshops to agree global standardisation such as naming conventions, and ensured all identified issues were addressed. Fox IT also ensured that all of the data sets were in a suitable format for importing into the toolset.

As the data was continually changing in the existing live environments whilst the new toolset was being configured and tested, Fox IT worked closely with the regions to maintain the accuracy of the data such that when each individual region went live the most current data sets had been imported into the new ITSM toolset.

Benefits

- Good control on a global basis of all data elements
- Introduction of global data standards
- Fox IT provided consistency due to in-depth knowledge of the functional requirements and how the foundation data was to be utilised in the ITSM toolset

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Overall Value and Benefits

The activities featured in this case study form part of a wider transformation programme from which the organisation is realising a number of benefits, including:

- All regions are now using the same instance of the same ITSM toolset with legacy systems decommissioned
- Consistency across all regions in the operation of the processes and use of the ITSM toolset
- Improved management reporting for analysing the quality of service delivery to the business as well as comparing regional performance

More specifically for the activities mentioned in this case study, numerous benefits were realised of which many have already been mentioned. Important key benefits that Fox IT delivered include:

- A completely objective and independent view of the current operation and practices
- Fox IT involvement throughout brought consistency and quality across key stages of the project lifecycle
- Helped to minimise the impact on internal resources in a number of areas
- Deliverables were able to be produced much quicker as a result of the use of mature tools (e.g. FoxMAPS™ and FoxPRISM) and prior experience of transformation programmes

About FoxPRISM™

FoxPRISM is a fully interactive web-based process knowledge database that assists in the design, implementation and management of service management processes. It provides a compendium of 32 processes (aligned to ITIL® and ISO/IEC 20000) and enables Fox IT consultants and their clients to accelerate their deliverables and hence realise benefits that much quicker. Click [here](#) for more details.

About Fox IT

Fox IT® has been a leading ITSM and governance business for over 30 years. We provide a range of practical and effective consultancy solutions designed to create agile, proactive, responsive IT organisations providing excellent IT services in alignment with our clients' goals to support and drive continuous business innovation. We achieve this by empowering your people with best practice training, developing and implementing the right operational processes and using properly configured and integrated tools to enable IT services transformation.

To discuss how we can assist you in transforming your IT services, ITSM toolset selection or in obtaining ISO/IEC 20000 certification please call us now on +44 (0) 333 202 1018.

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