

Fox IT assists global investment bank with ITSM transformation

Fox IT performs global process design, assists with ITSM toolset functional requirements definition, and provides project management support

This global investment bank has a 5-year transformation programme aiming 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 first case study based on this client focused on a baseline maturity assessment, one of the first activities to be undertaken as part of a 5-year transformation programme commissioned by senior management (click [here](#) to read the case study).

The initial assessment highlighted that there were different approaches and operating practices within the individual regions and IT business units of the Infrastructure Services (IS) division. The organisation had already recognised the importance of introducing closer global alignment and the findings from the review confirmed the need for this. The next phase of the programme was to better align operating processes and practices, along with the replacement and/or rationalisation of existing toolsets to further enhance efficiencies and derive additional cost savings.

Whilst a decision had already been taken to migrate to a new IT service management (ITSM) toolset for all areas of IS, before commencing on those activities it was vital to define globally-aligned processes from which the toolset could be configured to support them. A key driver for the organisation was to implement ITSM good practice across all regions (utilising ITIL®¹ as the basis), and for all regions to be operating processes in the same manner. The introduction of a new toolset became an ideal opportunity to not only undertake this activity, but also to ensure that it underpinned those processes.

Scope and Approach

Global process definition workshops

Due to the scale of the activities required and the number of stakeholders involved, it was decided to split the initial phase of work into two distinct tranches: Tranche1 would focus on incident management, event management, request fulfilment and problem management; Tranche2 would focus on configuration management, change management, release management and service validation & testing.

For each of the processes mentioned, the first activity was to define and agree global processes. Fox IT®² facilitated process definition workshops, engaging with stakeholders from all affected regions and business units to determine globally aligned processes that met the needs of the organisation as a whole, but also took into consideration any localised requirements that were also deemed necessary.

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² Fox IT® is a registered trademark of Fox IT SM Limited

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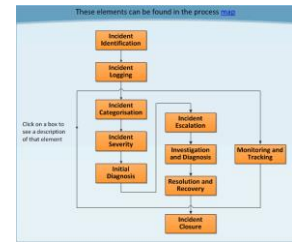
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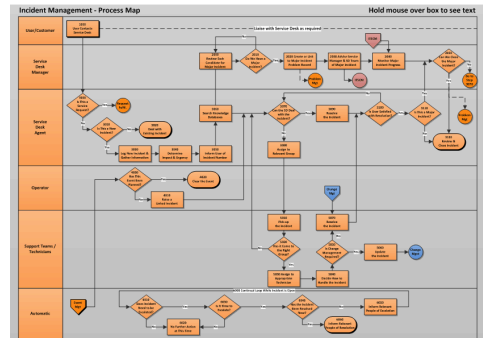
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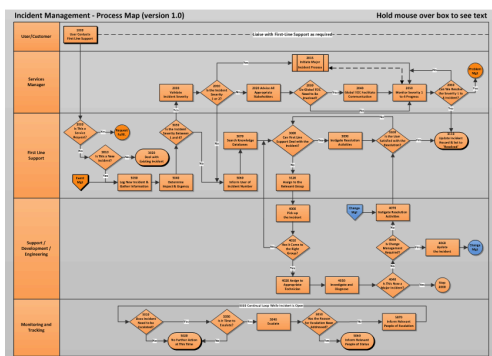
Each workshop started with a recap of the assessment output for that particular process; this helped as a ‘scene setter’ to highlight any key issues that needed to be addressed when agreeing the new process. The consultant facilitating the workshop then went back to basics and explained the fundamentals of the process and its key elements – this helped to ensure that all participants had a common understanding; this was especially helpful for those that hadn’t yet been trained on the ITIL framework.



After covering the basics, the consultant then did a walkthrough of Fox IT’s default process from its FoxPRISM™ process implementation accelerator tool. The processes in FoxPRISM are aligned to ITIL and also support the requirements of ISO/IEC 20000, and enable the development of client-specific processes and other related deliverables much quicker than would otherwise be possible (i.e. if starting with a blank sheet of paper).



The initial walkthrough is done to ensure that all workshop participants understand what the process as a whole is trying to achieve, what each of the individual steps within the process flow represents, and which roles are performing those activities.



The process was then reviewed for a second time, but on this occasion it was customised to fit the client’s future state operation. Each step within the process was individually reviewed and agreed as necessary. Typically, some steps may be assigned to different roles, new steps may be added for completeness, and any redundant steps removed. Importantly, interfaces to and from other processes are also confirmed.

The output from each workshop was a customised version of how the client wanted their process to be operated in the future, and of which they wanted the new ITSM toolset to underpin its operation.

A key challenge when facilitating workshops on this scale is gaining agreement across all territories and all IT business units, so it is important to ensure that the number of people participating is not excessive and that those that do attend are empowered to make decisions on behalf of the people that they are representing. Another important factor for Fox IT when facilitating the sessions was also to ensure that the organisation remained true to its requirement of implementing ‘good practice’.

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.

As part of the sign-off activity for the revised processes, use-case scenarios were developed and then workshops held (known as 'table-top walkthroughs') where the use-cases were used to fully validate the end-to-end process. This helped to ensure that each process supported all types of cases (e.g. different types and criticality of an incident, etc.) and that the interfaces between processes were also aligned correctly. Where necessary, this led to minor tweaks to the processes before final sign-off was achieved.

Later on in the project Fox IT created additional supplemental material including process policy documents and 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 provide easy access to anyone within the organisation, anywhere in the world, to all of the reference material for the processes being implemented.

ITSM functional requirements

With the processes agreed, the next step was to determine the functional requirements of the new ITSM toolset. Fox IT facilitated workshops between the client and toolset subject matter experts, ensuring that any client-specific requirements (over and above the 'out of the box' toolset product) did not detract from the agreed processes, and that the objective of toolset alignment remained true. Where issues did arise then Fox IT coordinated discussions to enable a suitable compromise (where appropriate).

Project support

During the course of the programme to its current position, Fox IT has also provided support at a project level. Roles have involved that of Project Manager, as well as providing general support to the Project Management Office and the Programme Manager. Activities have included, amongst others, chairing project meetings, maintaining the project plan and pre go-live checklists, etc.

Further assistance was also provided in the development of regular communications material to update the user community on the project's progress, developing training material that focused on the process, and providing quality assurance on the training material for the ITSM toolset that was produced by the vendor.

Overall Value and Benefits

The activities featured in this case study derived a number of benefits, including:

- Individual process owners have been supported by Fox IT consultants who were engaged in developing other related processes which ensured consistency.
- All regional stakeholders had the opportunity to provide input.
- Definition and agreement of globally-aligned processes and the production of associated policies and metrics were delivered in reduced timescales due to external facilitation and use of FoxPRISM content.
- Issues with process-toolset alignment were addressed with Fox IT consultant-led discussions provided ongoing objectivity and ensuring the original objectives were maintained.
- Realisation of significant savings in time, effort and cost.

Transformation programme 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 an ITSM toolset better aligned to the organisational requirements.

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- Costly legacy systems have been decommissioned and other opportunities for consolidation identified.
- Consistency across all regions in the operation of the nine processes defined so far as well as consistent use of the ITSM toolset.
- Improved reporting for analysing the quality of service delivery to the business.

As already outlined (and together with the initial assessment that was performed) Fox IT has been involved in many activities in support of the transformation programme, and we continue to work with the client as their 5-year roadmap progresses. Some of the important benefits that Fox IT has delivered include:

- Continuing involvement throughout the programme has brought consistency and quality across key stages of the project lifecycle.
- Providing support across a collection of disciplines has 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. FoxPRISM™) and prior experience of transformation programmes.

As mentioned in the first case study based on this client, Fox IT is now planning another assessment activity so that improvement progress from the initial review can be measured, with the results then feeding into the on-going continual service improvement activities.

Fox IT is also about to embark on a second phase of process development, with another selection of ITIL processes forming the basis of further enhancing the ability of IS to better meet the needs of the business across all global territories and in a consistent manner.

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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