

Fox IT assists global investment bank with ITSM transformation

Fox IT performs maturity assessments across all four global regions

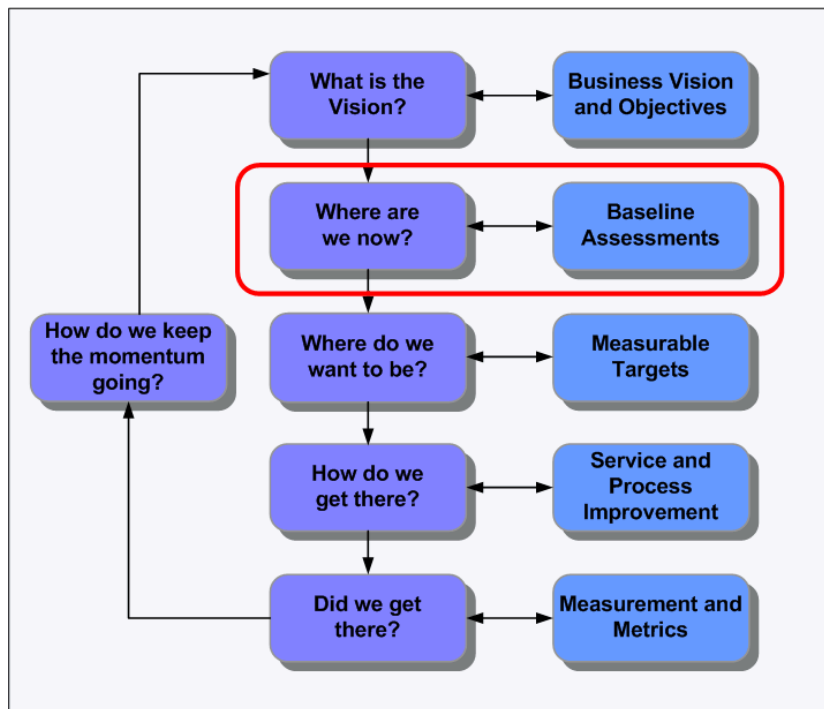
This global investment bank has a 5-year transformation programme aiming to transform their service management framework and service delivery capability, introducing consistent working practices across all regions as well as the implementation of a new ITSM toolset.

Background and Requirements

Following structural re-organisation within the business, the senior management team of the Infrastructure Services (IS) division began focusing effort into driving long-term cost reduction, and increasing both effectiveness and productivity. It was recognised that part of this objective could be supported through implementing good practice service management principles and processes.

With different approaches in individual regions and IT business units, it was seen as important to begin to introduce global alignment in operating processes and practices, with replacement and/or rationalisation of existing toolsets also providing an opportunity to introduce further efficiencies and cost savings.

Senior management had set a 5-year roadmap for their transformation programme, focusing on a number of key areas to better support the business in their objectives. They understood that for any improvement journey it was important to understand the starting point of the route and to baseline the current IT operation before embarking on any improvement or implementation activities.



Scope and Approach

Fox IT^{®1} was engaged to undertake an ITIL^{®2} assessment in each of the four global territories that the investment bank served, and visited the main operating bases in each region: London, Tokyo, Mumbai and New York. The client had selected sixteen IT service management (ITSM) processes to be the focus of review in each location, rather than attempt to cover all areas of the five ITIL lifecycle stages.

Using Fox IT's FoxMAPS[™] assessment methodology, the format for each site visit was the same:

- Interview sessions with key stakeholders (process owners, process managers, process practitioners) to discuss process operation, interfaces and inter-dependencies.
- Observation of process activities being undertaken (e.g. visiting the Service Desk, watching change requests being raised and processed, etc.) and the use of the existing ITSM toolsets.
- Review of evidentiary material (such as documents and records).

Interview sessions were centred on answering a set of pre-defined questions specific to an area of focus that prompted discussion and debate, with scores allocated and agreed for each element reviewed. Items for observation or worthy of further evidentiary review were identified during the sessions, with all input combined enabling an accurate picture to be determined of the current activities being performed across the 16 different processes. Additional input was also taken from business representatives to ensure a fully-rounded view of the IT services being delivered.

Communication was also key in gaining the trust of IS personnel and to prove that Fox IT is non-judgmental when performing assessments. This helps to ensure that discussions are open and honest; a factor that is always vital if a review is going to be productive for a client. As a precursor to the site visits, webinars were held with participants to explain the approach and objectives so that they were fully aware of what to expect when attending their interview sessions. This helped to inform participants that the reviews were non-threatening and started to build relationships that would benefit all of the subsequent activities.

Fox IT also undertook in parallel the delivery of ITIL training to complement the overall programme by raising IS team awareness and understanding of the process concepts and ITIL terminology, and which helped in engaging fully with all operational staff.

Results and Outputs

Following each site visit, all of the data that had been collated was analysed and a highly detailed report was produced for each region. Each report contained the following:

- Management Summary – providing a high-level overview of the results, the key issues that were determined, and key recommendations.
- Process Scores and Maturity Ratings.
- Process-by-process observations; clearly identified strengths and weaknesses; prioritised improvement recommendations.

These individual reports helped to identify a number of quick wins, but importantly also provided baseline scores that were necessary if future improvement progress was to be accurately measured.

¹ Fox IT[®] is a registered trademark of Fox IT SM Limited

² ITIL[®] is a registered trademark of AXELOS Limited

Head Office

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

Registered Address

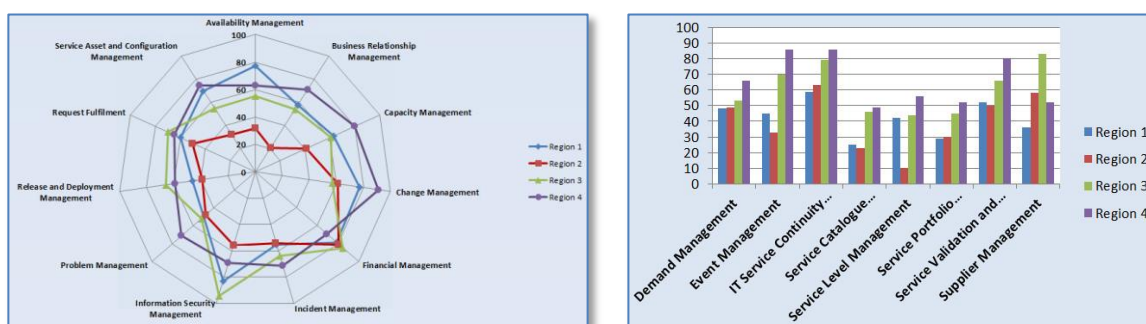
Fox IT SM Limited
1 Vincent Square
London SW1P 2PN

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

Company Registration Number 7390255
Company VAT Number GB 156 4959 68

On conclusion of all regional reviews, comparative analysis was undertaken and the following output was also generated (targeted to specific audience types):

- **Global Assessment Report** – containing comparative and region-specific assessment scores and maturity ratings, IS generic and region-specific key issues, organisational findings, generic concerns, focal areas for improvement.
- **Global Results Executive Presentation** – highlighting key areas of concern, organisational findings, key issues to address, comparative assessment scores.
- **Consolidated Process Assessment Reports** – separate comparative reports covering each individual process to enable process owners to more easily see the global state of their own respective process.
- **Remedial Activities** – featuring next steps, planning and prioritisation of activities, project management support, training and skills transfer.



Note: example scores only are shown

The assessment phase concluded with a delivery of the Executive Presentation to the steering group, which included the overall programme sponsors, and provided the facility to discuss the findings with the consultants involved in the review activities.

Overall Value and Benefits

By undertaking an initial assessment at the outset of the transformation programme there were a number of key benefits that were derived:

- A completely objective and independent view of the current IS operation and practices within each individual region.
- Comprehensive reports covering people, processes and tools that provided valuable input to the project as a whole and other organisational continual service improvement activities.
- A detailed set of prioritised recommendations enabling the easy identification of quick wins.
- Baseline measurements to facilitate the accurate monitoring of improvement progress, and provided the data for setting realistic targets for achieving higher levels of maturity.

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.
- Costly legacy systems have been decommissioned and other opportunities for consolidation identified.

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@foxit.com

Company Registration Number 7390255
Company VAT Number GB 156 4959 68

- 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.

Fox IT has been involved in many activities during 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. FoxMAPS™) and prior experience of transformation programmes.

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.

About FoxMAPS™

Fox IT has developed an innovative range of assessment services, commonly known as FoxMAPS™ to provide an independent and objective view of an organisation's effectiveness, leading to a roadmap for improvement. These assessments use a structured approach to gather and analyse relevant information and then to produce the output in a format that meets the business needs.

A FoxMAPS™ assessment not only provides a baseline from which to measure future progress, but clearly identifies the issues that need to be addressed and provides individual recommendations for their remediation. 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.

Please come and join in the latest ITSM conversations on our social media pages:

Facebook: www.facebook.com/FoxIT.ITSM

Twitter: @FoxIT_ITSM

LinkedIn Company Page: www.linkedin.com/company/fox-it

LinkedIn Group: <http://www.linkedin.com/groups/Fox-IT-ITSM-Today>

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@foxit.com

Company Registration Number 7390255
Company VAT Number GB 156 4959 68