

Fox IT provides customised ITSM toolset testing and education support to Global Investment Bank

This organisation is one of the world’s largest financial institutions, with corporate divisions covering investment banking and securities, wealth management and asset management.

This financial services provider required assistance in managing the testing of ITSM toolset releases as well as enhancing the training delivery to the user community.

Business Challenge

There were two linked major initiatives within the investment bank: one, a supplier transition project, was being managed by one of the corporate divisions while the second, development and provision of a global service management toolset, was being delivered by a centrally based team. Fox IT¹ was engaged to provide consultancy support to both projects.

One particular area of concern was that the constant and frequent updates to their integrated IT service management (ITSM) toolset resulted in issues regarding the on-going training of the user community in its use. A disparate global user community was being hindered by the lack of quality and consistency in the training that was being delivered. At the same time, there was a failure to deliver training that had any sort of local perspective for this worldwide audience. All of this was leading to a lack of coherent use of the toolset, resulting in records being processed inconsistently between the numerous support teams.

The Solution: Training

Fox IT first devised a training plan in conjunction with the ITSM toolset development team that enabled timescales for delivery of training to be set that aligned with their implementation plans. For each release, including major and minor releases, Fox IT developed training materials which were customised to provide a local perspective and which included:

- Slideshow presentations that provided step-by-step guidance in all aspects of the ITSM toolset, including:
 - setting user configuration and preferences
 - creating a record and working through its lifecycle
 - using pre-existing solutions/knowledge articles
 - relating multiple records together
 - handling incidents and service requests
- Pre-recorded ‘webinar’ training sessions, made available as Windows Media Video files
- User guides that supported the training activities and provided additional detail on the contents of the releases, relevant to a particular global region

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

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Utilising web-conferencing facilities, training sessions were delivered by Fox IT from a central London base to a global audience. Registrations to the sessions were checked against user lists to ensure all relevant personnel attended; for those unable to attend live training, the pre-recorded sessions were made available via the organisations intranet. Ongoing validation of attendance ensured comprehensive coverage to as many users as possible prior to a release being deployed. Questions asked by users during the multiple training sessions were collated and, along with the relevant answers, were made available to all users via the intranet.

The Solution: Testing

Fox IT gained the involvement of key users (i.e. support staff) in performing user acceptance testing (UAT), the first time that they had been engaged in this activity. As the user community was on a global basis, Fox IT coordinated the testing worldwide, across multiple teams and time zones. Test results were collated and analysed, with the results fed back to the development team. Fox IT represented the user community in development discussions, and was also engaged as one of the sign-off authorities in authorising the deployment of releases into the live environment.

The Solution: Categorisation structure

Additionally, Fox IT was asked to coordinate a review of the existing Category/Type/Item (CTI) structure configured within the ITSM toolset. This required almost 100,000 combinations of CTI to be reviewed by various support teams across the world, with the aim of simplifying the structure and reducing the volume of CTIs in use. This review resulted in a significant reduction in the combinations used, making it easier for users in making the correct selections and therefore enhancing the data quality for reporting purposes. Once complete, Fox IT worked with the toolset team to introduce the new CTI structure, rolling it out on a phased basis.

Value and Benefits

Some of the benefits that were derived from the activities highlighted in this case study include:

- Training that matched the roll-out plans of the organisation, and which was delivered on a timely basis and targeted to specific audiences
- User involvement in testing resulted in issues being highlighted earlier in the development lifecycle rather than waiting until a release was deployed into the live environment, thereby reducing the volume of bugs and defects that were previously experienced
- This involvement in testing also generated early ideas and suggestions for the training requirements that needed to be fulfilled for the user community, including the identification of localised in-country requirements
- All users had the opportunity to receive the same, consistent training – either live or at their own convenience, and including future new starters as part of their induction package
- Better quality of data populated in the ITSM toolset, more effective management of those records, together with greater use made of existing solution information (knowledge articles, known errors, etc.)
- A reduction by 40% of the number of CTIs in use, leading to better quality reporting and improved performance of the ITSM toolset

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Also for this client, Fox IT was engaged on a number of other key projects that supported the overall ITSM improvement and transformation initiatives, including:

- Introducing a capability to provide a single view of all changes occurring on a global basis, integrating information from five different systems
- Developing a central operational Problem Management function, introducing new reporting mechanisms, and coordinating the recovery of serious incidents and subsequent post mortems

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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